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ABSTRACT

This report assesses the economic impact created by the presence of American Indians in Oklahoma. In 1980, American Indians in Oklahoma numbered 169,459, or 5.6% of the state's population. Most Indians lived in central and eastern counties. Compared to the general population, Indians were younger, less educated, and had higher unemployment and poverty rates. Mail survey responses from 146 businesses owned by individual Indians indicate that: (1) these firms are concentrated in Tulsa and Oklahoma City; (2) most employees work in construction, manufacturing, agriculture, forestry, and fisheries; and (3) these businesses have little involvement with tourists. Responses from 16 tribes show $49 million in tribal budgets, $80 million in federal and state assistance, $52 million in annual gross sales for tribally owned business, and $4.5 million in tourism generated by tribal activity and businesses. Oklahoma received $273 million, 8.9% of total federal Indian domestic assistance, for fiscal year 1986. All Oklahoma Indian-owned businesses employed 6,956 people, produced sales of $951 million, and accounted for an estimated $196 million in gross state product (GSP). American Indians working outside Indian-owned businesses and tribal enterprises contributed about $82 million to the Oklahoma economy as employees. Estimates of American Indian contributions account for less than 1% of the GSP; this can be increased by increasing federal payments to Oklahoma's American Indians and by generating additional Indian entrepreneurial activity. The report includes 31 tables, graphs, and maps. (SV)

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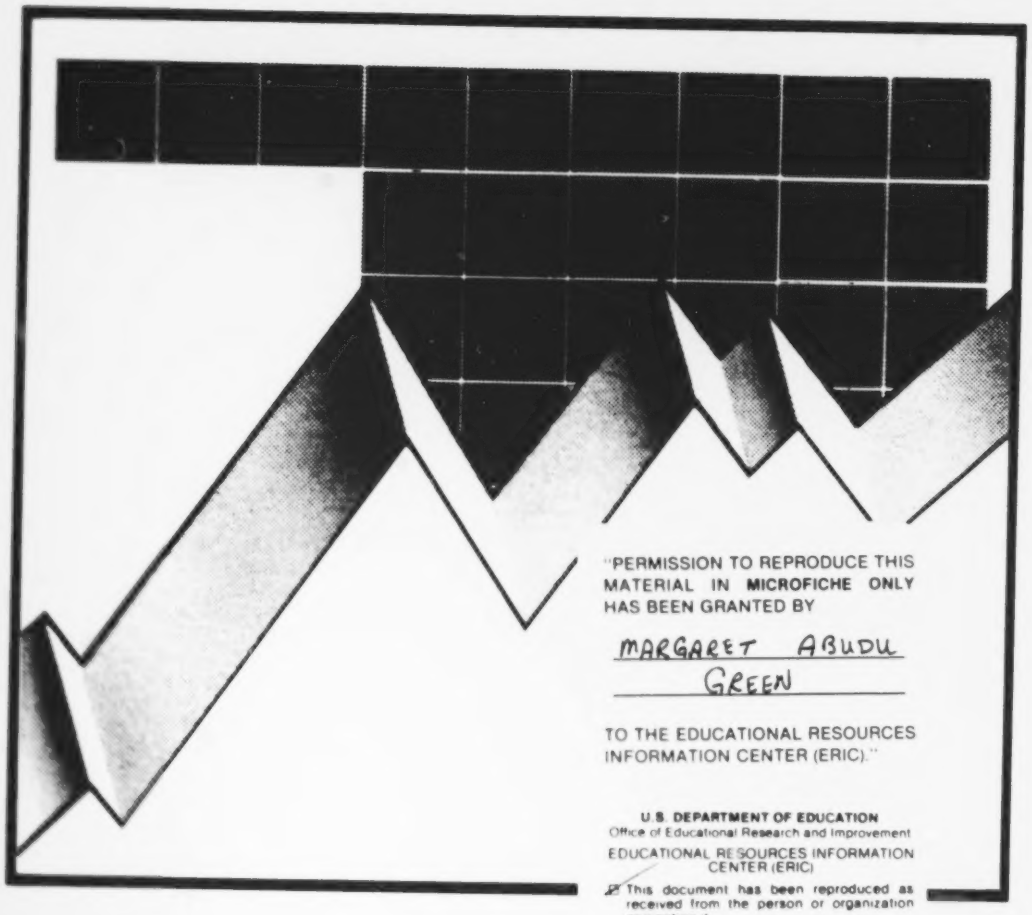

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REPORT

ON THE

ECONOMIC IMPACT OF AMERICAN INDIANS

IN THE

STATE OF OKLAHOMA

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TABLE OF CONTENTS

EXECUTIVE SUMMARY . . . . . i-vi

SECTION ONE: INTRODUCTION. 1

Background 1
Purposes of the Report 2
Organization of the Report 3
Acknowledgements 4

Planning Committees. 4
Principal Authors. 4
Bureau of Indian Affairs Support 5
Staff Support. 5

SECTION TWO: DESCRIPTION OF DATA SOURCES AND METHODS USED. 7

Data Sources and Methods Used to Construct the Profile of Indian-Owned Businesses. 7
Data Sources and Methods Used to Construct the Economic and Business Profile of Indian Tribes in Oklahoma 10
Data Sources and Methods Used to Construct the Profile of Federal Indian Domestic Assistance in Oklahoma. 11

SECTION THREE: DEMOGRAPHIC PROFILE OF THE AMERICAN INDIAN POPULATION IN OKLAHOMA 13

Population Size and Locational Characteristics 13
Age Structure of the Indian Population 14
Education. 19
Employment and Labor Force Participation 20
Income and Poverty Status. 22

SECTION FOUR: MAJOR FINDINGS 26

Profile of Indian-Owned Businesses 26

Geographic Distribution of Indian-Owned Businesses 26
Types of Economic Activity 32
Number of Employees. 35
Dollar Volume of Payroll 37
Dollar Volume of Gross Sales 39
Perceived Effects of Indian-Owned Businesses on Oklahoma Tourism. 41

Economic and Business Profile of Federally-Recognized Indian Tribes in Oklahoma 42

Profile of Federal Indian Domestic Assistance in Oklahoma. 46

SECTION FIVE: ECONOMIC IMPACT ANALYSIS 55

Indian-Owned Businesses 55
Tribally-Owned Businesses. 57
Tribal Governments 57
Federal Indian Domestic Assistance to Oklahoma 58
Summary and Final Observations 60

SECTION SIX: APPENDICES

Appendix One: "The State of American Indian Economic Development in Oklahoma" Conference Program 64
Appendix Two: Survey Materials for Indian-Owned Businesses. . . .65
Appendix Three: Survey Materials for Federally-Recognized Indian Tribes and List of Tribes Surveyed 70
Appendix Four: Detailed Budget Breakdown for Federal Indian Domestic Assistance: U.S. Department of the Interior 76
Appendix Five: Detailed Budget Breakdown for Federal Indian Domestic Assistance: Indian Health Service, U.S. Department of Health and Human Services . . .77
Appendix Six: Detailed Budget Breakdown for Federal Indian Domestic Assistance: U.S. Department of Education 78

INDEX TO REPORT GRAPHICS

Graphic 3.1:
Oklahoma's American Indian Population, 1960-1980 (Table) 13

Graphic 3.2:
Number of American Indians in Oklahoma, By County, 1980 (Map). 15

Graphic 3.3:
American Indians as a Percent of County Population in Oklahoma, 1980 (Map). 16

Graphic 3.4:
Median Age of American Indians, U.S. and Oklahoma, 1960 - 1980 (Table) 17

Graphic 3.5:
Population by Age and Sex for American Indian and Total Populations, Oklahoma, 1980 (Bar Chart) 18

Graphic 3.6:
Years of School Completed by Person 25 Years and Older American Indians in Oklahoma, 1960 - 1980 (Table) 20

Graphic 3.7:
Labor Force Participation and Unemployment Rates for Oklahoma Indians, By Sex: 1960 - 1980 (Table) 21

Graphic 3.8:
Percent of American Indian Employment in Oklahoma, by Industrial Sectors, 1960 - 1980 (Bar Chart) 23

Graphic 3.9:
Median Income for American Indians with Income, Oklahoma and U.S., 1959, 1969, and 1979 (Table) 24

Graphic 3.10:
Poverty Status and Public Assistance Income for American Indians in Oklahoma, 1969 and 1979 (Table). 25

Graphic 4.1:
Number of Indian-Owned Businesses, By Oklahoma Counties (Map). 27

Graphic 4.2:
Number of Indian-Owned Businesses, By Oklahoma Counties Containing At Least One Indian-Owned Business (Bar Chart) 29

Graphic 4.3:
Number of Indian-Owned Businesses, By Cities Within Oklahoma Counties Containing At Least One Indian-Owned Business (Table) 30

Graphic 4.4:
Number of Indian-Owned Businesses, By Federally-Recognized Indian Tribal Locations (Map). 31

Graphic 4.5:
Number and Percent of Indian-Owned Businesses, By Major Standard Industrial Classification System Categories (Table). 32

Graphic 4.6:
Percent of Indian-Owned Businesses, By Standard Industrial Classification System Categories (Bar Chart). . .33

Graphic 4.7:
Detailed Breakdown Showing Number of Indian-Owned Businesses, By Major and Minor Standard Industrial Classification System Categories (Table). 34

Graphic 4.8:
Number of Persons Employed in Indian-Owned Businesses, By Standard Industrial Classification System Categories (Table). 36

Graphic 4.9:
Dollar Volume of Payroll For Indian-Owned Businesses, By Standard Industrial Classification System Categories (Table). 37

Graphic 4.10:
Dollar Volume of Gross Sales for Indian-Owned Businesses, By Standard Industrial Classification System Categories (Table). 39

Graphic 4.11:
Number and Location of Indian-Owned Businesses Indicating They Help to Generate Tourism in Oklahoma Communities (Table) 41

Graphic 4.12:
Estimated Dollar Volume of Tourism Generated By the Presence of Indian-Owned Businesses in Selected Oklahoma Communities (Bar Chart) 43

Graphic 4.13:
Economic and Business Profile of Indian Tribes in Oklahoma (Table) . .45

Graphic 4.14:
Summary Budget Breakdown for Federal Indian Domestic Assistance, United States (Table) 47

Graphic 4.15:
Summary Budget Breakdown for Federal Indian Domestic Assistance, State of Oklahoma (Table) 47

Graphic 4.16:
Detailed Budget Breakdown for Federal Indian Domestic Assistance, United States (Table) 49-50

Graphic 4.17:
Detailed Budget Breakdown for Federal Indian Domestic Assistance, State of Oklahoma (Table) 51-52

Graphic 5.1:
Measures of Indian-Owned and all Businesses in Oklahoma (Table). . . .56

EXECUTIVE SUMMARY:

The "Report on the Economic Impact of American Indians in the State of Oklahoma" provides important baseline information on selected characteristics of the economic activities of American Indians in Oklahoma and assesses the economic impact which is created by the presence of American Indian populations within the state of Oklahoma.

Information presented in the report is based on the following: (1) an analysis of Indian-owned businesses listed in the Oklahomans for Indian Opportunity Indian Business Directory; (2) a survey of businesses listed in this directory; (3) a survey of federally-recognized tribes in Oklahoma; and (4) a survey of federal departments and agencies which provide federal Indian domestic assistance to Oklahoma.

DEMOGRAPHIC CHARACTERISTICS OF OKLAHOMA'S AMERICAN INDIAN POPULATION: A profile highlighting essential demographic characteristics of the American Indian population in Oklahoma indicates the following important characteristics:

- In 1980, a total of 169,459 American Indians lived in Oklahoma, comprising 5.6% of the state's total population, or one of every 16 persons. Oklahoma has the second highest number of American Indians in the nation; of the nearly 1.5 million American Indians nationally, 12% live in the state of Oklahoma.
- The Indian population of Oklahoma is evenly split by urban and rural residence, and slightly more than one-fourth live within the two major metropolitan areas of Oklahoma City and Tulsa. Nonetheless, Indians in Oklahoma are less urbanized than the rest of the state's population, which is approximately two-thirds urban.
- The majority of Oklahoma Indians live in the eastern and central portions of the state. In general, the eastern counties in the state have proportionately larger Indian populations than the state average of 5.6%. One-fifth of the Indian population lives in Tulsa and Oklahoma counties, and several eastern counties have very significant proportionate Indian populations.

- The state's Indian population is considerably younger than the total state population. The median age for American Indians in 1980 was 23.6, compared to 30.1 for the state as a whole. The median age for Indians in the state has increased 2.8 years since 1960. As fertility declines and individuals live longer, we can expect the median age to continue to increase in the future. In 1980, approximately one-third of the state's Indian population was under 15 years of age, as compared to about one-fifth of the total state population.
- The elderly comprise a much smaller proportion of the Indian population than is the case for the state's total population. In 1980, 12% of American Indians in the state were 60 years and older, compared to 17% for all races. As is true for the total population, Indian females tend to live longer than males.
- While Indian educational achievement in Oklahoma has improved significantly in the past several decades, it is still below that of the total population. Whereas the percentage of Indians 25 years and older who were high school graduates increased from 31% in 1960 to 56% in 1980, the total state percentage for high school graduation was 66%. Less than 9% of American Indians possessed a college degree in 1980, compared to 15% for all Oklahomans. The state's Indian population residing in urban areas is generally better educated than is its rural Indian population.
- Indian labor force participation is similar to that for all races in the state. In 1980, 61.0% of Indian males and 41.5% of Indian females were in the labor force, and one out of every 20 workers in the state was American Indian.
- The Indian unemployment rate in Oklahoma has been at least double that of the total population over several decades: 12.1% versus 4.4% for 1960; and approximately 8.5% versus 4.4% for both 1970 and 1980.
- In 1980, two-thirds of the state's American Indians were employed as private wage and salary workers, one fourth as government workers, and 7% as self-employed or unpaid family workers. The majority of Oklahoma Indians are employed in the Professional and Related Services; Manufacturing; and Wholesale and Retail Trade sectors.
- Employment patterns for Oklahoma Indians differ from the statewide patterns, in that Indians in the state are more likely to be employed in Manufacturing; Construction; and Public Administration. They are less likely to work in Mining; Wholesale and Retail Trade; Transportation; and Finance, Insurance, and Real Estate.
- As measured by per capita income and median family income, American Indians in Oklahoma have less income than both U.S. Indians and the total state population. The median family income in 1979 for American Indians in Oklahoma was $13,481, while it was $13,724 for Indian families nationally, and $17,668 for all Oklahoma families.

- In 1979 10.1% of the state's population with incomes below the poverty level were American Indian. While statistics indicate considerable improvement in the poverty figures for Oklahoma's Indian population in the decade 1969 to 1979, Indian families in Oklahoma continue to experience nearly double the rate of poverty for the total state population; and approximately one in five of all Indian families have incomes less than the poverty level.

PROFILE OF INDIAN-OWNED BUSINESSES:

- Indian-owned businesses appear to be more heavily concentrated in Oklahoma counties comprising the eastern half of the state. While there is a wide variation in the number of Indian-owned firms across Oklahoma counties, the highest concentrations occur in the state's two major metropolitan counties, Tulsa and Oklahoma counties, with secondary concentrations in Caddo, Cleveland, Comanche, Carter, Cherokee, Muskogee, and Osage counties.
- Within these counties, the highest concentrations of Indian-owned businesses occur in the cities of Tulsa, Oklahoma City, Anadarko, Carnegie, Norman, Lawton, Ardmore, Tahlequah, Muskogee, and Pawhuska.
- The number and percent of active Indian-owned businesses in Oklahoma, as classified by the twelve major categories of the Standard Industrial Classification System, differs from the distribution which characterizes all firms in Oklahoma. The concentration of Indian-owned businesses in the Construction industry is much higher than is true for all Oklahoma businesses (36% as compared to 9%). In addition, the concentration of Indian-owned businesses in Business and Repair Services and in Professional and Related Services is almost twice as high as for the total population of business owners in the state. These relatively higher concentrations are offset by relatively lower concentrations of ownership by Indians in the Wholesale and Retail Trade sectors.
- Oklahoma's American Indian entrepreneurs are involved in a wide range of businesses. In addition to the relatively heavy concentration of ownership in Construction, a comparison of the distribution, by type of business, of Indian-owned businesses with a detailed distribution of all Oklahoma business firms indicates a relatively greater ownership by American Indians of businesses which provide services to dwellings and other buildings, as well as engineering, architectural, and survey services.
- Nearly three-fourths (74.2%) of all employees of Indian-owned businesses are concentrated in the Manufacturing; Agriculture, Forestry and Fisheries; and Construction sectors.

- In contrast, less than 10% of all employees of Indian-owned businesses are working in the Finance, Insurance and Real Estate; Personal Services; and Professional and Related Services sectors.
- As measured by number of employees per firm, Indian-owned firms are significantly larger than all Oklahoma firms in the Agriculture, Forestry and Fisheries; and Construction sectors; and significantly smaller than all firms in the Mining; Transportation, Communications, and Public Utilities; and Retail Trade sectors.
- Payroll figures for Indian-owned businesses closely correlate with the data on number of employees. Accordingly, almost three-fourths of all payroll (73.5%) is accounted for by the Construction; Manufacturing; and Agriculture, Forestry, and Fisheries sectors.
- Indian-owned firms have much larger payrolls per firm than non-Indian-owned firms in the Construction; Finance, Insurance and Real Estate; and Business Repair Services sectors. Yet, payroll per firm for Indian-owned businesses is much smaller than for non-Indian-owned firms in the Manufacturing; Transportation, Communications, and Public Utilities sectors. This may suggest the concentration of ownership by American Indians in relatively low wage businesses within these sectors.
- Construction and Manufacturing account for 77.9% of all gross sales reported by Indian-owned businesses. Wholesale Trade accounts for another 12.9%, and all other business sectors account for only 9.3% of the total gross sales by Indian-owned businesses.
- Payroll as a percent of sales receipts is significantly less for Indian-owned firms than for all firms in Oklahoma in the Construction, Manufacturing, and Wholesale Trade sectors. This suggests either less labor intensity or lower wages in Indian-owned businesses in these sectors.
- Payroll as a percent of sales receipts is significantly larger for Indian-owned firms in Retail Trade. This suggests relatively greater labor intensity or higher wages in Indian-owned firms in this sector.
- Sixteen, or 10.9%, of the Indian-owned businesses surveyed indicated that their business(es) help to generate tourism in Oklahoma communities. While these businesses estimate that they generate $1,662,500 of tourism in Oklahoma, perhaps the most significant finding of this aspect of the survey is the small degree to which Indian business owners are engaged in providing goods and services to tourists.

ECONOMIC AND BUSINESS PROFILE OF FEDERALLY-RECOGNIZED INDIAN TRIBES IN OKLAHOMA:

- Sixteen federally-recognized Indian tribes responded to a mailed tribal economic and business survey. They reported $49,097,644 in tribal budgets; 2,253 tribal government

employees; $80,737,489 in federal and/or state assistance; $52,012,036 in annual gross sales for tribally-owned businesses; 863 employees of tribally-owned businesses; and an estimated $4,569,882 of tourism generated in Oklahoma communities by tribal cultural activities and/or tribally-owned businesses.

- Tribally-owned businesses are more labor intensive than are both individually owned Indian businesses and all Oklahoma businesses.
- Tribally-owned businesses are more heavily involved in meeting the demands of tourists than are businesses owned by individual Indians.

PROFILE OF FEDERAL INDIAN DOMESTIC ASSISTANCE IN OKLAHOMA:

- Oklahoma received a total of $272,994,445 of the $3,052,754,000 in federal Indian domestic assistance for the 1986 fiscal year (8.9%); and is projected to receive $299,894,264 of the 2,983,833,000 in federal Indian domestic assistance for the 1987 fiscal year, or 10.1%.
- The Department of the Interior, the Department of Health and Human Services, the Department of Education, the Department of Housing and Urban Development, the Department of Agriculture, the Department of Transportation, and the Department of Labor account for the bulk of the current levels of federal Indian domestic assistance.
- Much of the federal government's domestic Indian assistance should be viewed as an investment in people, physical assets, and natural resources, instead of as a program which merely transfers income from one group to another. Much of the contribution from these programs to the economy will show up, therefore, in future years.

ECONOMIC IMPACT ANALYSIS: An economic impact assessment of Indian-owned businesses, Indian tribal budgets, tribally-owned businesses, and the level of federal Indian domestic assistance in Oklahoma indicates the following:

- It is estimated that all Oklahoma Indian-owned businesses currently employ 6,956 people, generate a payroll of $109.9 million, and produce sales of $951.4 million.
- The most widely-accepted measure of a firm's contribution to a state's economy is the Gross State Product (GSP) originating in that firm. It is estimated that Indian-owned firms account for $196.2 million in GSP.
- It is estimated that GSP originating in the businesses owned by Oklahoma Indian tribes that responded to our survey is $20.8 million.

- The GSP originating from the employment provided by tribal governments that responded to our survey is estimated to be $40 million.
- Federal assistance to American Indians is projected to be $299,894,264 to Oklahoma for the 1987 fiscal year. These expenditures probably generate more than this amount during the current year, as people are hired and goods and services are produced in Oklahoma in response to these expenditures. Future increases in income are also created by federal assistance in the form of investments in human and physical capital and natural resources.
- It is estimated that American Indians working outside Indian-owned firms, tribally-owned firms, and tribal governments contribute approximately $82,000,000 to the Oklahoma economy as employees.
- Demographic data suggest a continued need for emphasis on public investment in the human capital of American Indians in Oklahoma.
- Efforts to further develop entrepreneurship among Oklahoma's American Indians would probably yield significant returns.
- The concentration of the entreprenuerial talent of American Indians in construction may be a sign of barriers to access to other industries. If this is the case, it suggests the need to identify these barriers and develop means to address them.
- The relatively small involvement by American Indians in tourism may reflect an untapped opportunity for economic development.

It is hoped that the "Report on the Economic Impact of American Indians in the State of Oklahoma" will provide the state's Indian and non-Indian leadership with an important baseline of information on selected characteristics of Indian economic activity, and that it will help to focus attention on the present and potential contributions of Indian individuals and Indian tribes to the development of the state of Oklahoma.

SECTION ONE: INTRODUCTION

BACKGROUND:

This report is a product of a program the Southwest Center for Human Relations Studies is implementing to assess the status of minorities in the state of Oklahoma. To assist the Southwest Center in this program, four separate task forces have been formed, as follows: The Task Force on the Status of American Indians in the State of Oklahoma; the Task Force on the Status of Asians in the State of Oklahoma; the Task Force on the Status of Black Americans in the State of Oklahoma; and the Task Force on the Status of Mexican-Americans and Other Hispanics in the State of Oklahoma.

The four task forces are assisting the Southwest Center in planning and implementing a series of statewide conferences and related activities. These programs are designed to help focus attention on the status of each of these populations within the state; to highlight the strength and contributions of these groups to the development of the state; to provide a baseline of significant information and insights; and to provide a framework for helping to identify recommendations to achieve a positive future for these groups in the state of Oklahoma.

The task Force on the Stauts of American Indians in the State of Oklahoma served as the primary planning body for the conference on "The State of American Indian Economic Development in Oklahoma," held on May 27, 1987. (See Appendix One). Task force members, listed on the inside cover of this report, were a rich and vital source of ideas concerning this conference. They identified the need for a statewide conference which could involve Indian and non-Indian leadership in the state's public and private sectors in a discussion of concerns relating to Indian economic development in the state. In addition, they saw the need for a study which could document the

economic contribution of Indian-owned businesses, Indian tribes, and tribally-owned businesses to the state; and could document the number of jobs which are created and the amount of dollars which both circulate within the state and enter the state because of the American Indian presence. From their vision and efforts both the conference on "The State of American Indian Economic Development in Oklahoma" and this "Report on the Economic Impact of American Indians in the State of Oklahoma" were developed.

The conference on "The State of American Indian Economic Development in the State of Oklahoma" was designed to provide significant information on the status of American Indian economic development in Oklahoma and to explore strategies to enhance American Indian economic activity and the economic relationships between the Indian nations, the state of Oklahoma, and local communities throughout the state. In addition, this conference provided an appropriate state-level forum for the presentation of this report.

PURPOSES OF THE REPORT:

The "Report on the Economic Impact of American Indians in the State of Oklahoma" presents significant information on the economic impact created by the presence of Indian individuals and Indian tribes in the state of Oklahoma. It represents an effort to provide documentation on selected characteristics of American Indian economic activity and to assess the economic impact of these activities on the state. It is hoped that the information presented can provide an important baseline of information on selected characteristics of Indian economic activity and the economic impact which is created by the presence of American Indian populations within the state of Oklahoma.

This report will provide useful information in each of the areas identified below:

- the geographic distribution of Indian-owned businesses;
- the types of economic activity in which Indian-owned businesses are involved;
- the number of persons employed in Indian-owned businesses;
- the dollar volume of payroll generated by Indian-owned businesses;
- the dollar volume of gross sales created by Indian-owned businesses;
- The number of Indian-owned businesses which perceive that their economic activities help to generate tourism, and an estimate of the dollar volume of tourism generated by the presence of Indian-owned businesses;
- An economic and business profile of Indian tribes in Oklahoma;
- the dollar volume of federal Indian domestic assistance which enters the state due to the presence of Indian populations; and
- an assessment of the economic impact of American Indians in the state of Oklahoma.

ORGANIZATION OF THE REPORT:

This report contains an executive summary and six major sections. The introductory section (Section One) provides brief background information, a description of the purposes and organization of the report, and acknowledgements. Section Two indicates the data sources and methods which were used in compiling the report. Section Three provides a brief demographic profile of the American Indian population in Oklahoma. This section includes information on population size, locational characteristics, age structure, educational characteristics, employment and labor force participation, and income and poverty status of the Oklahoma Indian population. Section Four presents the major findings of the report. This section provides a detailed profile of Indian-owned businesses, an economic and business profile of

Indian tribes in Oklahoma, and a profile of federal Indian domestic assistance in Oklahoma. Section Five contains an economic impact analysis which attempts to assess the economic impact of the American Indian presence within the state. Section Six serves as an appendix.

ACKNOWLEDGEMENTS:

PLANNING COMMITTEES: The Executive Committee of the Southwest Center for Human Relations Studies and the Southwest Center's Task Force on the Status of American Indians in the State of Oklahoma served as the primary planning groups for the conference on "The State of American Indian Economic Development in the State of Oklahoma," held on May 27, 1987. (See Appendix One). Members of each of these planning groups are listed on the inside cover of this report. In particular, members of the Southwest Center's Task Force on the Status of American Indians in the State of Oklahoma served as a rich and vital source of ideas concerning this conference. They identified the need for a statewide conference which could involve Indian and non-Indian leadership in the state's public and private sectors in a discussion of concerns relating to Indian economic development in the state. In addition, they saw the need for a study which could document the economic contribution of Indian-owned businesses, Indian tribes, and tribally-owned businesses to the state; and could document the amount of dollars which both circulate within the state and enter the state because of the American Indian presence. From their vision and efforts both the conference on "The State of American Indian Economic Development in the State of Oklahoma" and this "Report on the Economic Impact of American Indians in the State of Oklahoma" were developed.

PRINCIPAL AUTHORS: While all sections of this report have benefited from the collaboration of the report's four principal authors, the major contributions of the principal authors deserve special note.

Mrs. Karen J. Selland, Director of the Oklahoma State Data Center, served as the principal author for the demographic information and accompanying graphics contained in the Section Three profile of the American Indian population in Oklahoma. Dr. Margaret Abudu Green, Executive Director, of the Southwest Center for Human Relations Studies, and Dr. Kent W. Olson, Professor of Economics at Oklahoma State University, co-authored Section Four, which presents a profile of Indian-owned businesses, a profile of Indian tribes and tribal businesses, and a profile of federal Indian domestic assistance in Oklahoma. In addition, Dr. Olson served as principal author of the economic impact assessment provided in Section Five. Mrs. Iola M. Hayden, Executive Director of Oklahomans for Indian Opportunity assisted in the implementation of various aspects of the study and provided insights concerning the interpretation of report findings and its potential implications and uses. Dr. Green assisted in the preparation of all sections of this report, served as the principal author of those sections not specified elsewhere in this paragraph, and provided the editorial and conceptual direction essential to the integration of a comprehensive study abd report of this nature.

BUREAU OF INDIAN AFFAIRS SUPPORT: The Southwest Center for Human Relations Studies wishes to thank Mr. Gary L. Rogers, Program Analysis Officer for the Washington, D.C. office of the Bureau of Indian Affairs, for compiling most of the information on federal Indian domestic assistance, presented in Section Four of this report. In addition, the Southwest Center expresses gratitude to the Anadarko Area office and the Washington, D.C. office of the Bureau of Indian Affairs, U.S. Department of the Interior, for their support of this report.

STAFF SUPPORT: Staff of the Southwest Center for Human Relations Studies and the Oklahoma State Data Center are to be acknowledged for their

contributions to this report. Mrs. Parichehr S. Nabavi, Southwest Center Editorial Assistant; and Mrs. Donna V. Reynolds, Southwest Center Secretary, assisted in proofreading and checking the recording of survey data presented in this report. Mrs. Nabavi helped to design report graphics contained in Sections Three through Five and helped to oversee many of the production details essential to the report's publication. Ms. Lisa N. Gover, a student research assistant for the Southwest Center, assisted in the survey of Ir ian-owned businesses and the survey of federally-recognized Indian tribes in Oklahoma.

In addition, two statistical analysts with the Oklahoma State Data Center assisted in the Section Three demographic profile of American Indians in the state of Oklahoma. Mr. John McCraw assisted in the compilation of the census data and Mr. Jeffrey Wallace computerized the maps and figures provided in Section Three.

It is hoped that the "Report on the Economic Impact of American Indians in the State of Oklahoma" will provide the state's Indian and non-Indian leadership with an important baseline of information on selected characteristics of Indian economic activity, and that it will help to focus attention on the present and potential contributions of Indian individuals and Indian tribes to the development of the state of Oklahoma.

SECTION TWO: DESCRIPTION OF DATA SOURCES AND METHODS USED

Information presented in this report was drawn from several major sources through the use of methodologies which were appropriate for the data gathered from each source. The principal methodologies used include demographic analysis, document analysis, survey research, and economic impact analysis.

The description of methods and data sources provided below indicates how the major types of information contained in this report were generated and compiled.

Data presented in the demographic profile of the American Indian population in Oklahoma were drawn from the 1980 Census of Population. When appropriate, information drawn from other decennial census periods are provided to indicate change over time. Where data presented were drawn from sources other than the 1980 Census of Population, the source of these data is duly noted.

DATA SOURCES AND METHODS USED TO CONSTRUCT THE PROFILE OF INDIAN-OWNED BUSINESSES:

Information provided in the profile of Indian-owned businesses contained in Section Four were drawn from the Oklahomans for Indian Opportunity Indian Business Directory, as well as from responses received from a mail survey sent to all Indian-owned businesses listed in this directory.

The Indian Business Directory is a working document compiled and updated by Oklahomans for Indian Opportunity, an organization founded in 1965 to enhance social, educational, and economic opportunities for Indian populations in Oklahoma. To assist it in programs dealing with economic

opportunities and economic development, the organization has compiled a comprehensive list of Indian businesses which have been identified through the organization's client contacts and its extensive outreach efforts to Indian entrepreneurs throughout the state. This directory is updated on a continuing basis and is estimated to contain approximately 80% of the Indian-owned businesses in the state of Oklahoma.

At the time information for this report was compiled, the names and addresses of 383 separate Indian-owned businesses were listed in the Indian Business Directory. The geographic distribution of Indian-owned businesses and the classification of Indian-owned businesses by types of economic activity, both of which are provided in the profile of Indian-owned businesses presented in Section Four, are based on the mapping of the locations of businesses listed in the Indian Business Directory and the classification of these businesses according to classifications provided in the Standard Industrial Classification System.

The remainder of the data provided in the Section Four profile of Indian-owned businesses were drawn from responses to a mail survey sent to owners of each of the 383 Indian-owned businesses listed in the Indian Business Directory. This survey requested information on the number of employees, dollar volume of payroll, dollar volume of gross sales, and perceived effects on tourism.

The initial survey of Indian-owned businesses was mailed on November 19, 1986. The mailing included a cover letter explaining the purposes of the survey, a survey form to be completed and returned to the Southwest Center for Human Relations Studies, and a list of members of the Southwest Center's Task Force on the Status of American Indians in the State of Oklahoma. Two additional follow-up mailings were sent to those Indian-

owned businesses for which completed surveys had not been returned. The dates of these follow-up mailings were December 19, 1986, and February 19, 1987. A copy of the contents of each of these three mailings is provided in Appendix Two of this report.

Information presented in Section Four on the number of employees, the dollar volume of payroll, the dollar volume of gross sales, and perceived effects on tourism is based on a total of 146 completed surveys which were returned to the Southwest Center. This represents a survey response rate of 38.1%, which is remarkably high for a mail survey. This high response rate is attributed to the following factors:

- the explanation provided of the purposes of the survey;
- the perception by owners of Indian-owned businesses that there is a need for documentary information concerning the characteristics of Indian-owned businesses and the perception that such information could serve as an important tool for informing and educating leadership in the public and private sectors of Oklahoma as to the economic significance of Indian economic activity within the state;
- the joining of the "Report on the Economic Impact of American Indians in the State of Oklahoma" with a major statewide conference featuring key representatives of Indian and non-Indian leadership in both the public and private sectors;
- the credibility attached to the survey efforts because of the stature of persons serving on the Southwest Center's Task Force on the Status of American Indians in the State of Oklahoma;
- the assurances which were provided concerning the confidentiality of survey responses, and the assurances that reporting would be in the form of aggregate totals which would not identify individual tribes, businesses, or programs; and
- the perception of the Southwest Center for Human Relations Studies, which serves as a university-based human relations center associated with a major teaching and research institution, as an objective, apolitical and credible organization involved in educational programs, research, and public service.

It is recognized that due to the sensitivity of the economic subject matter requested by the survey, some degree of over-reporting or under-

reporting may have been present in the survey responses. Accordingly, responses were checked for "reasonableness" in terms of consistency between responses concerning the number of employees, the dollar volume of payroll, and the dollar volume of gross sales. It was beyond the scope of this study to attempt any sort of independent verification of the survey responses received.

If instances of over-reporting appeared in survey responses -- in the absence of any instances of under-reporting -- the economic indicators of Indian-owned businesses provided in this report would be exaggerated. If, however, instances of under-reporting appeared -- in the absence of any instances of over-reporting -- the economic indicators of Indian-owned businesses would be understated. It is perhaps reasonable to assume that some over-reporting and some under-reporting occurred in the survey responses and that these had the effect of cancelling out one other.

DATA SOURCES AND METHODS USED TO CONSTRUCT THE ECONOMIC AND BUSINESS PROFILE OF INDIAN TRIBES IN OKLAHOMA:

Tribal leaders of thirty-one federally recognized Indian tribes in Oklahoma were surveyed in an effort to gather information on their tribal budgets, amount of domestic assistance received, and any businesses owned and operated by the tribes. An initial survey and two follow-up mailings were sent on the same dates as were the surveys to Indian-owned businesses described above. These mailings used a version of the cover letters sent to owners of Indian-owned businesses and included the list of members of the Southwest Center's Task Force on the Status of American Indians in the State of Oklahoma.

Appendix Three contains a copy of the survey materials used to construct the tribal economic and business profile, as well as a list of the federally recognized Indian tribes in Oklahoma which were surveyed.

Specific information requested on the tribal survey included the following:

- Total dollars of the tribal budget;
- Total number of persons employed by the tribe;
- Total dollars of federal and/or state domestic assistance;
- Total number of persons employed in tribally-owned businesses;
- Annual dollar volume of gross sales by tribally-owned businesses; and
- An estimate of the dollar volume of tourism generated in Oklahoma communities by tribal cultural activities or tribal businesses.

Completed tribal economic and business profile surveys were returned by 16 of the 31 tribes surveyed, constituting a 51.6% response rate. This is an extremely high response rate in mail survey research and is especially remarkable given the high level of sensitivity regarding the sovereignty issue as it relates to the economic activities of Indian tribal businesses. It is believed that the high tribal response rate can generally be attributed to the same factors which were identified on page 9 of this report as contributing to the high response rate for Indian-owned businesses.

As was the case with the survey of Indian-owned businesses, it was beyond the scope of this study to attempt any sort of independent verification of the responses received.

DATA SOURCES AND METHODS USED TO CONSTRUCT THE PROFILE OF FEDERAL INDIAN DOMESTIC ASSISTANCE IN OKLAHOMA:

Data reported in the profile of federal Indian domestic assistance in Oklahoma, contained in Section Four of this report, were developed primarily through a telephone survey conducted by Mr. Gary L. Rogers, Program Analysis Officer of the Bureau of Indian Affairs in Washington, D.C.

The Report of the Presidential Commission on Indian Reservation Economies (1984) provides national-level information on federal domestic Indian assistance for the 1983 and 1984 fiscal years. The format for reporting federal domestic Indian assistance provided in this presidential commission report was adapted for use in the present report, in an effort to

provide as much comparable information as possible, updated to the 1986 and 1987 fiscal years for all departments, bureaus and programs for which 1983 and 1984 data were published. In addition, an effort was made to break out the Oklahoma portion of total federal Indian domestic assistance.

Telephone surveys were completed over a six-week period to appropriate federal officers, to gather information on the federal Indian domestic assistance for all bureaus and programs within the following departments:

- Department of the Interior
- Department of Health and Human Services
- Department of Agriculture
- Department of Education
- Department of Labor
- Department of Housing and Urban Development
- Department of the Treasury
- Department of Commerce
- Department of Transportation
- Environmental Protection Agency
- Small Business Administration
- Department of Energy

Federal officials were asked to supply data on the level of federal Indian domestic assistance provided by all bureaus and programs within their department and to identify the Oklahoma share of this total. In instances where bureaus and programs had changed since the 1984 presidential commission report, an effort was made to identify and account for all deletions and program name changes.

SECTION THREE: DEMOGRAPHIC PROFILE OF THE AMERICAN INDIAN POPULATION IN OKLAHOMA*

POPULATION SIZE AND LOCATIONAL CHARACTERISTICS:

In 1980 a total of 169,459 American Indians lived in Oklahoma, comprising 5.6% of the total population in the state, or one of every 16 persons (see Graphic 3.1, below). The state of Oklahoma had the second highest number of American Indians in the nation, surpassed only by California, which had more than 201,000. In fact, one of every eight American Indians living in the United States lives in Oklahoma.

The American Indian population in Oklahoma appears to have grown tremendously since 1960, when only 64,689 Indians were counted. While the total population of Oklahoma increased by 30% between 1960 and 1980, the American Indian population rose by 162%. Such phenomenal growth is not unique to Oklahoma, however, since the increase in the state mirrors the national increase in American Indians over the two decades. Much of the apparent growth can be attributed to reporting and collection differences among the various censuses. From 1960 to 1980 there were improvements in enumeration procedures, more extensive use of self-identification, changes in the wording of the race question, and a greater frequency of reporting as Indian especially by those of mixed Indian and non-Indian descent. These changes are the major sources of the larger than normal increase over the twenty-year period.

Graphic 3.1
OKLAHOMA'S AMERICAN INDIAN POPULATION, 1960 - 1980

	1960	1970	1980
Total Population	64,689	96,803	169,459
Percent of Total Oklahoma Population	2.8	3.8	5.6
Percent of Total U.S. Indian Population	12.4	12.7	11.5

* Unless otherwise noted, data presented in this section are taken from the decennial censuses of population conducted by the U.S. Bureau of the Census.

The Indian population of Oklahoma is evenly split by urban and rural residence. Half live in urban areas of cities or towns with at least 2,500 residents; half live in rural areas, both farm and non-farm. Although a little more than one-fourth live within the two major metropolitan areas of Oklahoma City and Tulsa, Indians in Oklahoma are less urbanized than the rest of the state's population, which is two-thirds urban, and one-third rural. While Oklahoma Indians in 1960 were more urbanized than Indians living across the U.S. (37% versus 30%) the national movement of rural to urban areas has been more rapid in other parts of the country over the past twenty years than in Oklahoma. By 1980, U.S. Indians were slightly more likely to live in urban areas than were Oklahoma Indians.

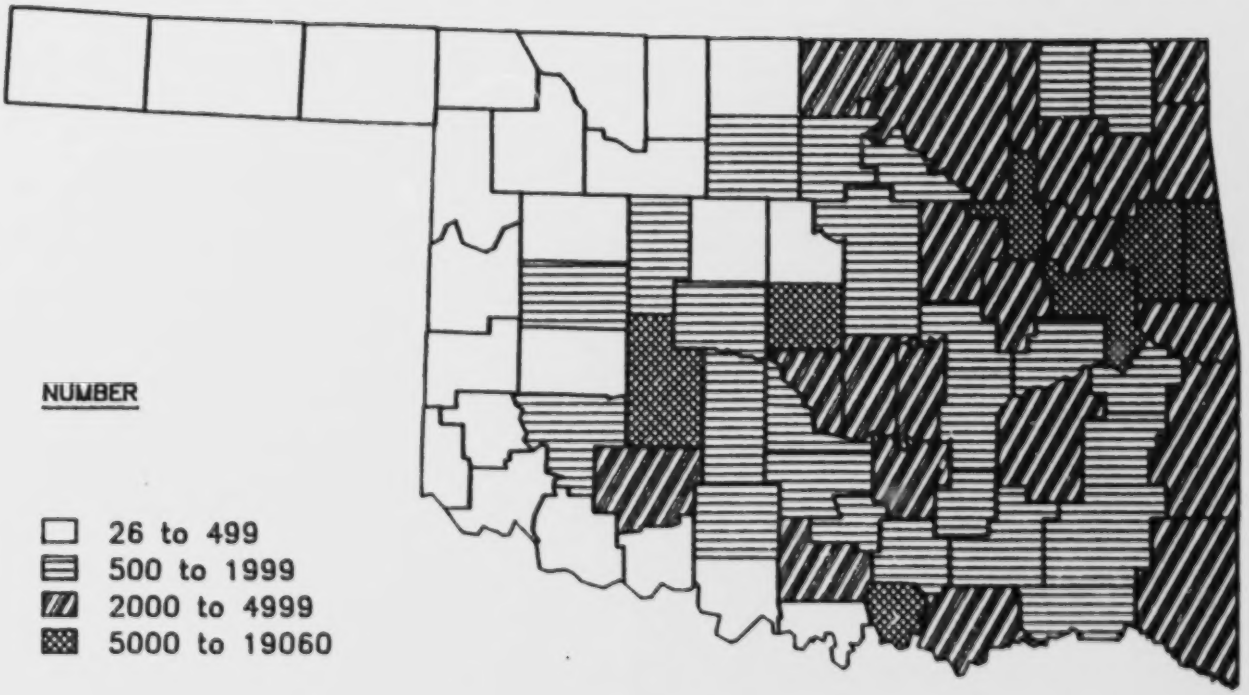
As shown in Graphic 3.2, on page 15, the majority of American Indians reside in the central and eastern portions of the state. Fewer Indians live in the western and panhandle regions, with the exception of Caddo and Comanche counties, which each have substantial Indian populations. One-fifth of the Indian population lives in Tulsa and Oklahoma counties, with the largest number for any single county (19,037) living in Tulsa County.

As can be seen in Graphic 3.3, on page 16, the majority of counties in the eastern half of the state have proportions of American Indian population higher than the state average of 5.6%. Several eastern counties have very significant proportionate Indian populations: one-third of the population is American Indian in Adair County, one-fourth in Cherokee County, and one-fifth in Delaware County. With only a few exceptions, Roger Mills, Blaine, Caddo, and Cotton counties, the western half of the state has proportionately few Indian residents.

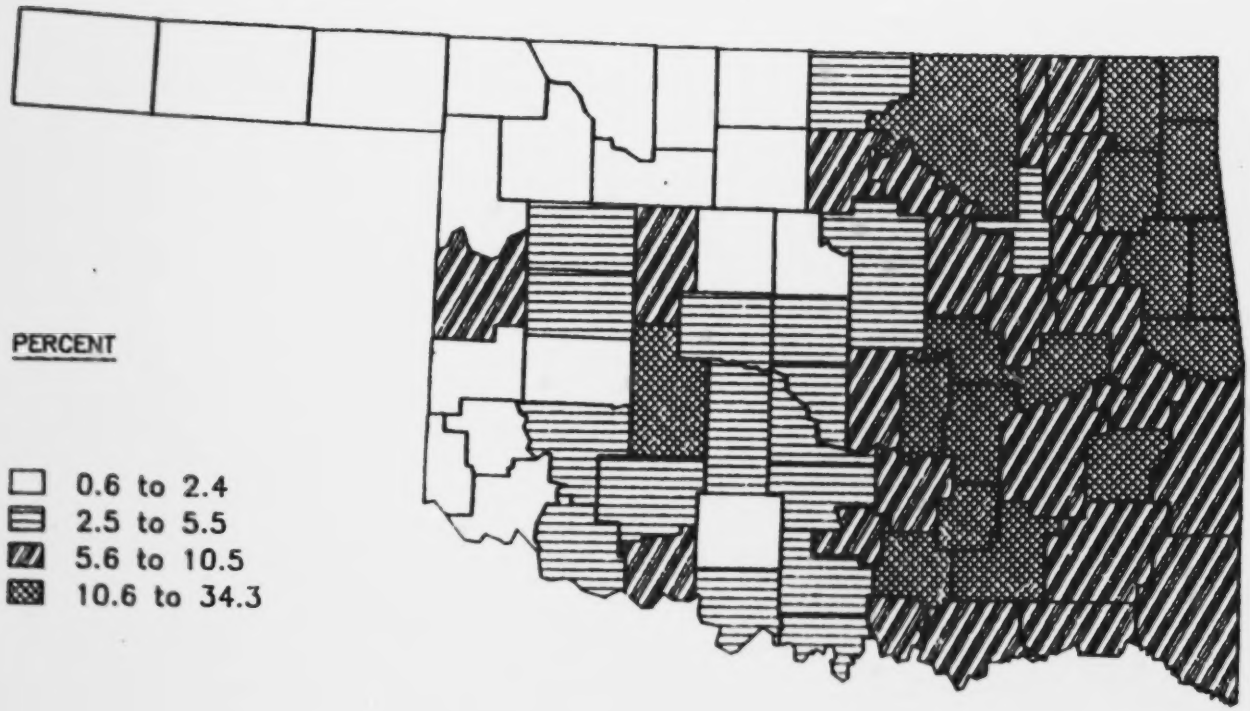
AGE STRUCTURE OF THE INDIAN POPULATION:

Oklahoma's Indian population is considerably younger than the state's population. While the state's median age in 1980 was 30.1, the median age

Graphic 3.2
NUMBER OF AMERICAN INDIANS
IN OKLAHOMA BY COUNTY: 1980



Graphic 3.3
AMERICAN INDIANS AS A PERCENT OF
COUNTY POPULATION IN OKLAHOMA: 1980



STATE AVERAGE – 5.6%

of the Indian population in the state was 23.6. The Oklahoma Indian population is, however, slightly older than the U.S. Indian population, which had a median age of 22.9 in 1980, as shown on Graphic 3.4, below. The median age for Indians in the state has increased 2.8 years since 1960, but nationally, the American Indian population has aged even more, adding 3.7 years over the two decades. As fertility declines and individuals live longer, we can expect the median age to continue to increase in the future.

Graphic 3.4

**MEDIAN AGE OF AMERICAN INDIANS,
U.S. AND OKLAHOMA 1960 - 1980**

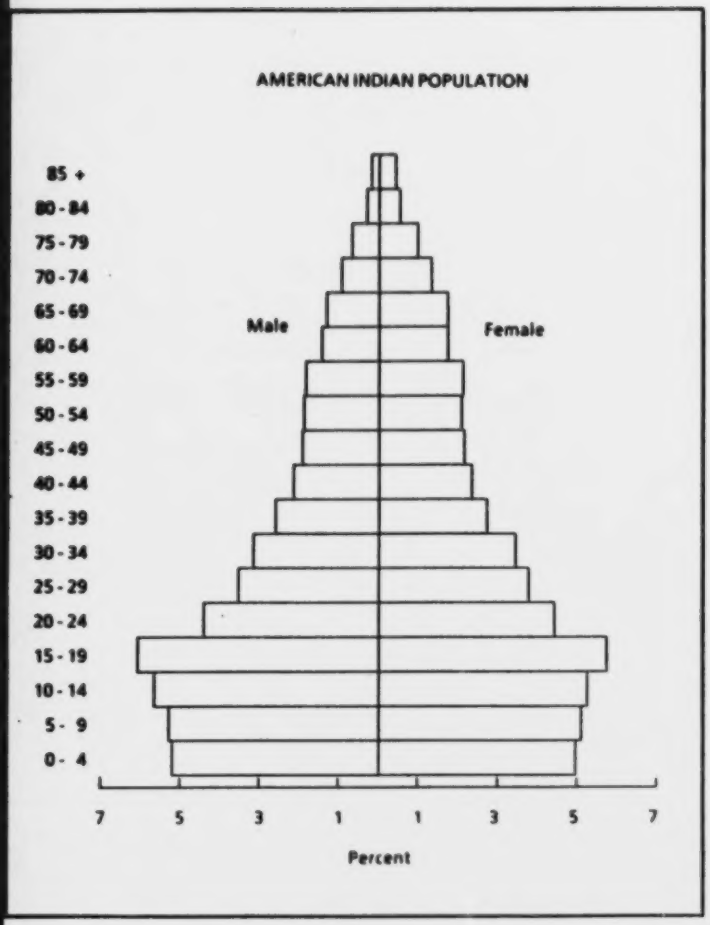
	1960	1970	1980
United States	19.2	20.4	22.9
Oklahoma	20.8	23.2	23.6

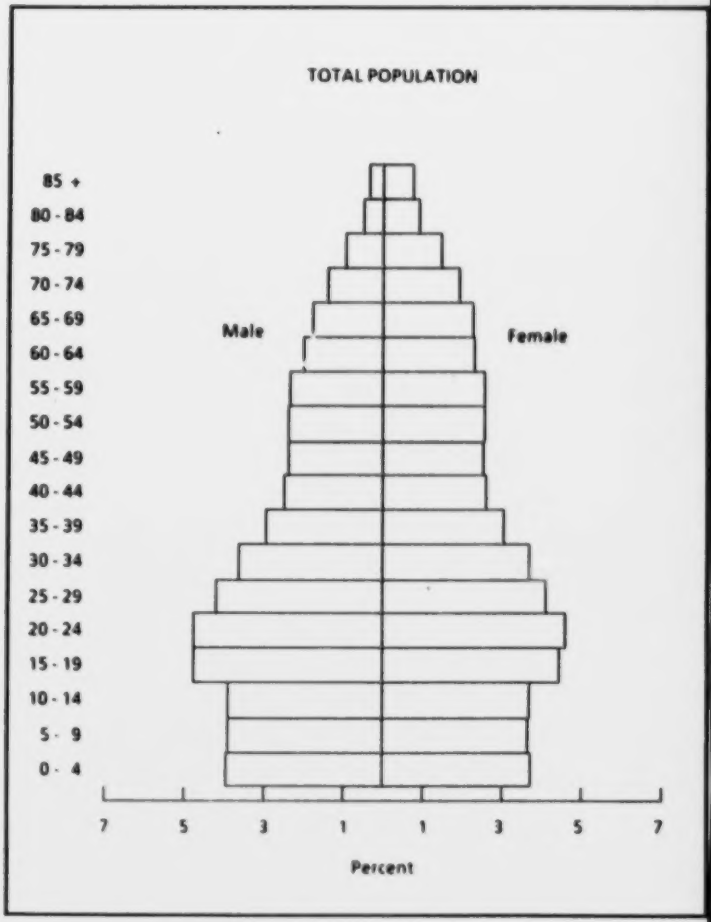
Another way of looking at a population's age is to examine the age distribution or the proportions of various age groups within a population. In 1980, approximately one-third of the Indian population was under 15 years of age, compared to about one-fifth of the total state population. In 1970, this age group occupied an even greater proportion, as 37% of Indians in the state were 14 years of age or younger.

When younger age groups account for large proportions of the age distribution, the elderly population correspondingly accounts for a smaller proportion. Only 12% of Indians in Oklahoma were at least 60 years of age in 1980, versus 17% for the entire state. The proportion of Indians 60 years and over has changed little since 1970.

One additional method for examining a population's age structure is by using population pyramids. An examination of the population pyramids for the Indian and total population of Oklahoma in Graphic 3.5, on page 18, also reveals a much younger Indian population. While the effect of recent

Graphic 3.5
Population by Age and Sex for American Indian and Total Populations,
Oklahoma, 1980





fertility declines are evident in both pyramids, in that the age groups under 15 years of age are smaller than expected, the pyramid depicting the Indian population has the more traditional "pyramid" shape, with a large base and a narrow top. Normally, this shape is characteristic of populations with both high fertility and high mortality. In general, the pyramid indicates that the Indian population has a large proportion of persons under 20 years of age and smaller proportions of both males and females at all older age groups. Like the total population, Indian females tend to live longer than males. This can be seen on the pyramids, especially in the older age groupings.

The dependency ratio is a measure of the economic dependency in a population, which calculates the ratio of those age groups under 16 and over 65 to those 16 to 64, i.e., those assumed to be in the work force. The dependency ratio of the Oklahoma Indian population is very high. The 1980 ratio of 74 for Oklahoma Indians compares to 65 for U.S. Indians and 59 for the total state. This means there is a smaller base of working age persons in the Indian population to support segments of the population assumed to the dependent.

EDUCATION:

In 1980, over 57,000 American Indians three years old and over were enrolled in Oklahoma schools from nursery school level through college. The percentage enrolled at various age groups was very similar for all races, except at ages 20 and 21, where considerably fewer Indian young adults were enrolled. In 1980, the median years of school completed for Oklahoma's American Indian population 25 years and older was 12.2 years, in contrast to 12.5 years for all races. The Indian population has shown significant improvement in educational achievement over the past two decades, as median years of school completed jumped from 8.3 years in 1960, to 10.3 in 1970, and finally to 12.2 in 1980, as shown in Graphic 3.6, on page 20.

Graphic 3.6

YEARS OF SCHOOL COMPLETED BY PERSON 25 YEARS AND OLDER
AMERICAN INDIANS IN OKLAHOMA 1960 - 1980

	1960	1970	1980
Median Years of School Completed	8.3	10.3	12.2
Percent High School Graduates	30.9	37.2	56.2
Percent College Graduates	2.1	4.4	8.8

While 56% of all Oklahoma Indians have completed high school, the Indian population still lags behind the general population, which had a 66% high school completion rate in 1980. The same is true of higher education, with less than 9% of American Indians possessing a college degree in 1980, compared to 15% of all Oklahomans. Although educational achievement has increased since 1960 among Indians in the state, all races have progressed concurrently. Oklahoma Indians have, however, slightly higher educational levels than Indians living elsewhere in the nation. By 1980 this difference had substantially lessened, with 55.5% of all Indians nationally having graduated from high school, and 7.7% from college.

The Indian population in Oklahoma residing in urban areas is generally better educated than is the rural Indian population. In 1980, the median years of school completed for urban Indians was 12.4 years, compared to 11.9 years for Indians living in rural areas. This pattern also held in 1970, when the median years of school completed in urban areas was 11.6 compared to 9.0 for Indians in rural areas. Proximity to colleges and universities in the urban areas may explain this difference.

EMPLOYMENT AND LABOR FORCE PARTICIPATION:

In 1980, the state's American Indian labor force (defined as those currently employed plus those actively seeking a job) was comprised of

approximately 63,000 persons, or 55.7% of all Indians age 16 and older. Labor force participation was only slightly higher for all races, at 60%.

According to the 1980 census, one of every twenty workers in the state was American Indian, and Indians living in urban areas were more likely to be in the work force than were those living in rural areas, (60% versus 50%). As shown in Graphic 3.7, below, Indian males were more likely to participate in the labor force than females. Less than half (41.5%) of Indian females are in the labor force, while for Indian males this figure is 61.0%.

Graphic 3.7

LABOR FORCE PARTICIPATION AND UNEMPLOYMENT RATES FOR OKLAHOMA INDIANS, BY SEX: 1960 - 1980*

Item	1960			1970			1980		
	Total	Male	Female	Total	Male	Female	Total	Male	Female
Labor Force Participation Rate	36.3	52.4	20.6	46.4	59.8	33.7	55.7	61.0	41.5
Unemployment Rate	12.1	13.3	9.2	8.6	8.2	9.3	8.4	9.2	7.4

* In 1960, the labor force included those 14 years of age and older; in 1970 and 1980, it included only those 16 years and older.

Labor force participation has increased dramatically since 1960, when 36.3% of American Indians 14 years of age and older were in the labor force. By 1970, when the definition of labor force participation changed to persons 16 years of age and older, 46.1% of American Indians participated. The Indian unemployment rate has been at least double that of the total population over several decades. In 1960, American Indians in the state experienced 12.1% unemployment, compared to 4.4% for the general population. In both 1970 and 1980, the state had unemployment rates slightly above 4%, but Oklahoma Indian unemployment rates were approximately 8.5%. Nationwide, Indians experienced even higher unemployment; in 1980, for example, more than 13% were unemployed.

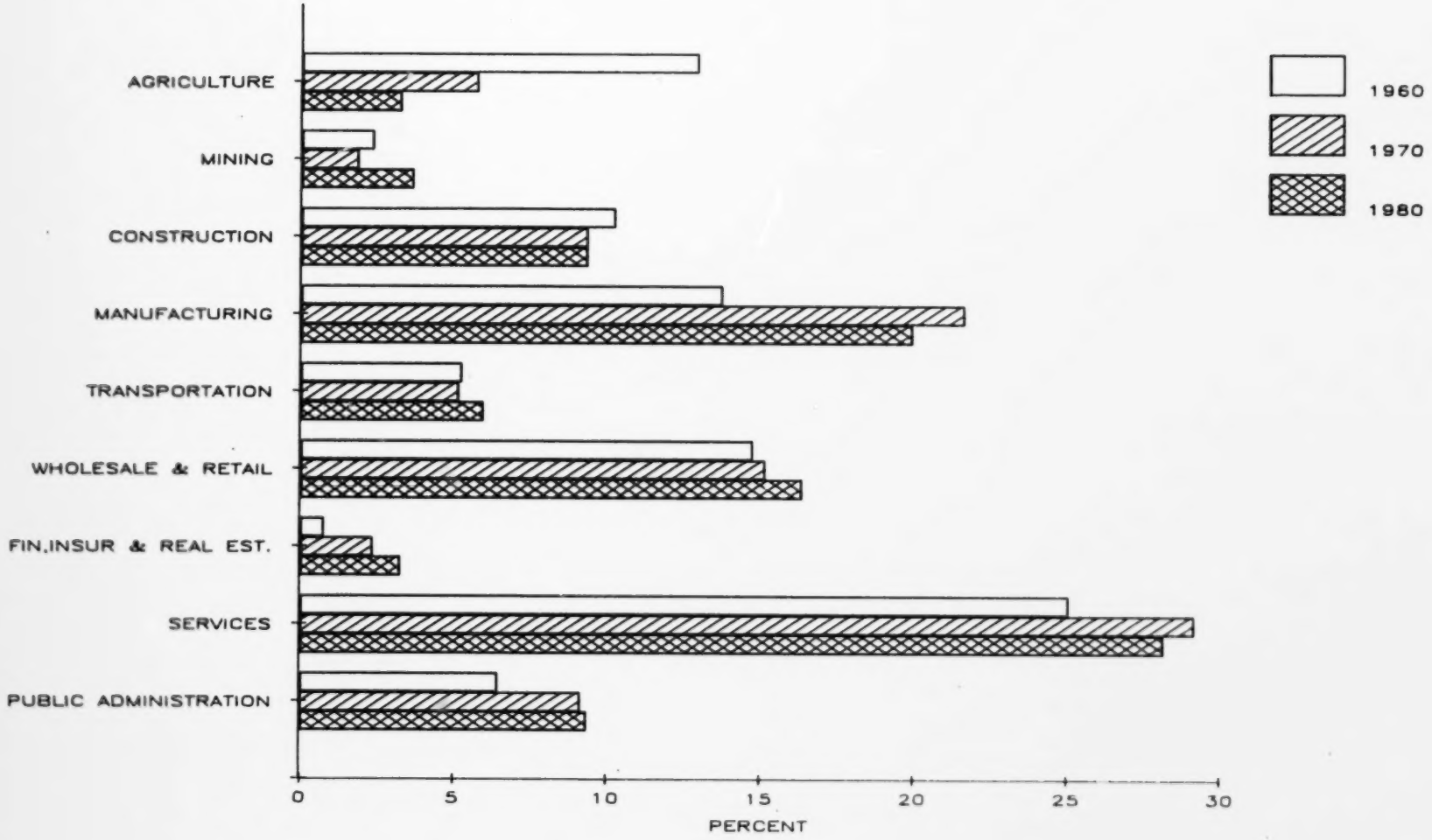
Of the more than 57,000 American Indians 16 years of age and above who were employed in Oklahoma in 1980, two-thirds worked as private wage and salary workers, one-fourth as government workers and 7% as self-employed or unpaid family workers. Seventy-five percent of the state's Indian employment is concentrated in five industries: Professional and Related Services (21%), Manufacturing (20%), Retail and Wholesale Trade (16%), Public Administration (9%), and Construction (9%).

The biggest change in Indian employment over the past two decades has been the drop in agricultural employment and the increases in employment in Manufacturing; Services; Public Administration; and Finance, Insurance and Real Estate, as shown in Graphic 3.8, on page 23. As is true for all races in the state, the largest number of workers are in the services sector. Professional and Related Services, such as educational, social and health services, make up the largest portion (three-fourths) of the services category. Employment patterns for Oklahoma Indians are similar to those of Indians across the country, but differ somewhat from state patterns. Indians in the state are more likely to be employed in Manufacturing; Construction; and Public Administration; but less likely to work in Mining; Wholesale and Retail Trade; Transportation; and Finance, Insurance and Real Estate than is the total population.

INCOME AND POVERTY STATUS:

On income measures the Indian population in the state falls below the total state population, as well as below the U.S. Indian population. While Oklahoma's overall per capita income was $6,858 in 1979, and the U.S. Indian per capita income was $4,577, the per capita income for Oklahoma Indians was $4,352. Graphic 3.9, on page 24, shows that Oklahoma Indians have consistently earned incomes below that of Indians nationwide and that Indian females have about half the income of Indian males.

Graphic 3.8
PERCENT OF AMERICAN INDIAN EMPLOYMENT
IN OKLAHOMA BY INDUSTRIAL SECTORS,
1960 TO 1980



Indian families in Oklahoma also have less income than both U.S. Indians and the total state population. In 1979, the median income of Indian families was $13,481 in Oklahoma and $13,724 in the nation, compared to $17,668 for all Oklahoma families. The difference between Indian families and families of all races in family income was not as large in 1969, when the median family income for all races in Oklahoma was $7,720 and for Indians, $5,446.

Graphic 3.9

MEDIAN INCOME FOR AMERICAN INDIANS WITH INCOME, OKLAHOMA AND U.S., 1959, 1969, and 1979

	1959		1969		1979	
	Oklahoma	U.S.	Oklahoma	U.S.	Oklahoma	U.S.
Females	*	*	$1,633	$1,697	$3,915	$4,263
Males	$1,538	$1,792	$3,254	$3,505	$7,781	$8,077

* Less than $1,000

Poverty statistics indicate that the Indian population is better off in Oklahoma than in the rest of the country but worse off than the general population in the state. In 1979, the nearly 40,000 Indians in Oklahoma with income below the poverty level made up 10.1% of all poor persons in the state. As indicated in Graphic 3.10, on page 25, in both 1969 and 1979, the poverty rate of both Indian persons and families surpassed that of the general population in the state, and approximated that of the U.S. Indian population. However, by 1979, the poverty rate of Oklahoma Indians dropped significantly below that for Indians nationally.

In 1979, one of every four Indian persons and one of every five Indian families had incomes below the poverty level, while one of every seven Indian households were receiving some type of public assistance. While these statistics shows very high rates of poverty among the Indian population, they

Graphic 3.10

POVERTY STATUS AND PUBLIC ASSISTANCE INCOME FOR AMERICAN INDIANS IN OKLAHOMA, 1969 and 1979

	1969			1979		
	Oklahoma Indians	Oklahoma Total	U.S. Indians	Oklahoma Indians	Oklahoma Total	U.S. Indians
Persons Below Poverty	38.3%	18.8%	38.3%	23.9%	13.4%	27.5%
Families Below Poverty	32.5%	15.1%	33.3%	19.9%	10.3%	23.7%
Households/ Families Receiving Public Assistance*	16.6%	7.6%	18.8%	14.0%	7.8%	17.4%

* Families in 1969, Households in 1979. Public assistance includes supplementary security income payments, aid to families with dependent children, and general assistance.

indicate considerable improvement over the poverty figures for 1969, when one-third of Indian families and more than one-third of Indian persons lived in poverty. In both 1969 and 1979, Indians living in the rest of the country fared worse than Oklahoma Indians and improved their condition less over the decade.

SECTION FOUR: MAJOR FINDINGS

This section provides three major profiles, as follows: a profile of Indian-owned businesses, an economic and business profile of Indian tribes in Oklahoma, and a profile of federal Indian domestic assistance in Oklahoma. A description of the data sources and methods used to construct each of these profiles is presented in Section Two of this report.

PROFILE OF INDIAN-OWNED BUSINESSES:

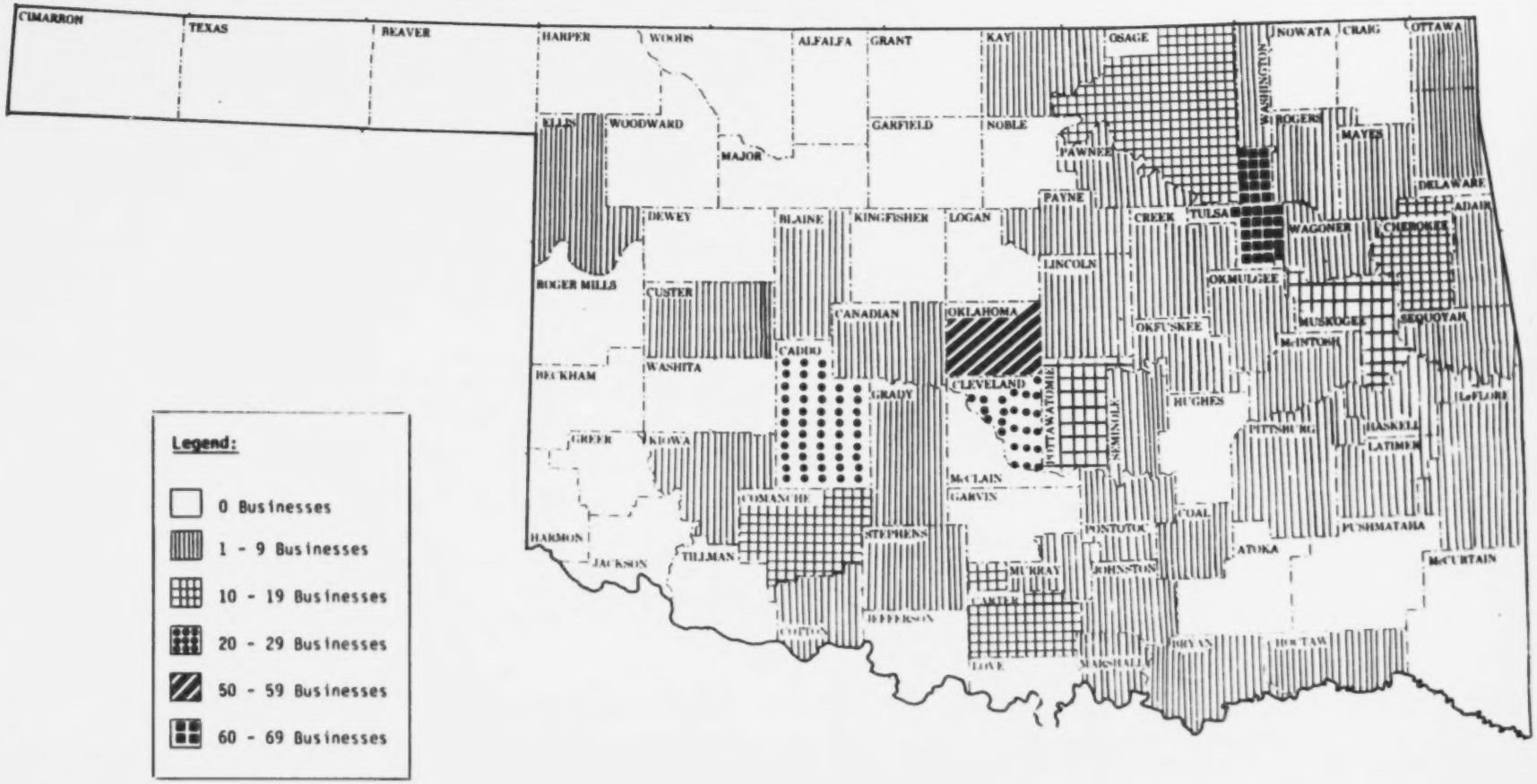
This profile presents information on the geographic distribution of Indian-owned businesses; the types of economic activity in which Indian-owned businesses are engaged; the number of employees; the dollar volume of payroll; the dollar volume of gross sales; and the effects that owners of Indian-owned businesses perceive their businesses have on Oklahoma tourism.

GEOGRAPHIC DISTRIBUTION OF INDIAN-OWNED BUSINESSES: Graphic 4.1, on page 27 of this report, presents a map of the state of Oklahoma showing the number of Indian-owned businesses within Oklahoma counties. This map indicates a greater concentration of Indian-owned businesses in the counties comprising the eastern half of the state. It also indicates that the highest concentrations of Indian-owned businesses occur in the state's two major metropolitan counties, Tulsa and Oklahoma counties. Secondary concentrations appear in Caddo, Cleveland, Comanche, Carter, Cherokee, Muskogee, and Osage Counties.

While the number of Indian-owned businesses in Tulsa County exceeds that in Oklahoma County, this pattern is expected to undergo change in the near future due to the recent inclusion of Oklahoma City within the

Graphic 4.1

NUMBER OF INDIAN-OWNED BUSINESSES,
BY OKLAHOMA COUNTIES



provisions of the Bureau of Indian Affairs Indian Financing Act of 1974. Provisions of this act will affect Indian-owned businesses in the Oklahoma City area by making funds available in the form of guaranteed loans, grants, and direct loans.

Graphic 4.2, on page 29, presents this information on the geographic distribution of Indian-owned businesses in Oklahoma in the form of a bar chart. This graphic clearly illustrates the wide variation in the number of Indian-owned firms across Oklahoma counties. Please note that only those counties with at least one Indian-owned business are listed in Graphic 4.2.

Graphic 4.3, on page 30, shows the number and city location of Indian-owned businesses in those Oklahoma counties which contain at least one such business. Again, primary concentrations occur in Oklahoma and Tulsa counties, with secondary concentrations in Caddo, Cleveland, Comanche, Carter, Cherokee, Muskogee, and Osage counties. Within these nine counties, cities with the highest concentrations of Indian-owned business activity can be identified, as follows: Tulsa (56), Oklahoma City (41), Anadarko (10), Carnegie (8), Norman (15), Lawton (11), Ardmore (13), Tahlequah (10), Muskogee (12), and Pawhuska (6).

Graphic 4.4, on page 31, displays the number of Indian-owned businesses in Oklahoma in terms of their locations within federally-recognized Indian tribal locations within the state. While it cannot be assumed that Indian-owned businesses within given tribal locations are necessarily owned by individual Indian entrepreneurs who are members of that tribe, this map does have meaning in terms of the traditional locations of Indian tribes in Oklahoma.

Graphic 4.2

NUMBER OF INDIAN-OWNED BUSINESSES BY OKLAHOMA COUNTIES CONTAINING AT LEAST ONE INDIAN-OWNED BUSINESS

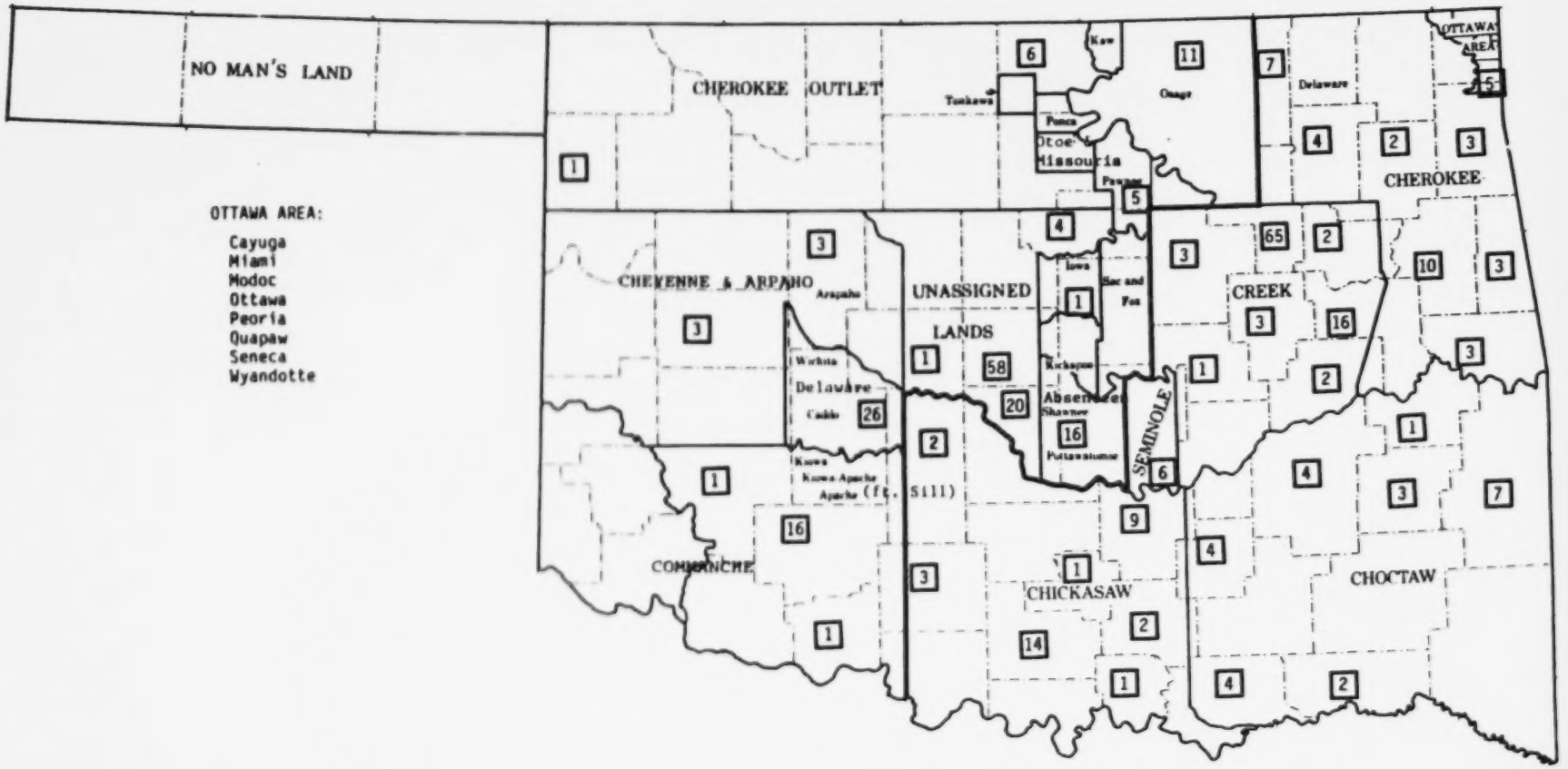
Graphic 4.3

NUMBER OF INDIAN-OWNED BUSINESSES, BY CITIES WITHIN OKLAHOMA COUNTIES CONTAINING AT LEAST ONE INDIAN-OWNED BUSINESS

Adair County	**3**
Stilwell	3
Blaine County	**3**
Canton	1
Geary	1
Watonga	1
Bryan County	**4**
Bennington	1
Durant	3
Caddo County	**26**
Anadarko	10
Apache	5
Binger	1
Carnegie	8
Gracemont	1
Washita	1
Canadian County	**1**
Yukon	1
Carter County	**14**
Ardmore	13
Lone Grove	1
Cherokee County	**10**
Tahlequah	10
Choctaw County	**2**
Bosewell	1
Sawyer	1
Cleveland County	**20**
Moore	2
Noble	3
Norman	15
Coal County	**4**
Coalgate	4
Comanche County	**16**
Cache	3
Elgin	1
Indiahoma	1
Lawton	11
Cotton County	**1**
Walters	1
Creek County	**3**
Kellyville	1
Sapulpa	2
Custer County	**3**
Weatherford	3
Delaware County	**3**
Jay	2
Kansas	1
Ellis County	**1**
Harmon	1
Grady County	**2**
Tuttle	1
Chickasha	1
Haskell County	**1**
Stigler	1
Johnston County	**2**
Connerville	1
Tishomingo	1
Kay County	**6**
Kaw City	1
Ponca City	5
Kiowa County	**1**
Mountain View	1
Latimer County	**3**
Wilburton	3
LeFlore County	**7**
Poteau	3
Spiro	1
Talihina	3
Lincoln County	**1**
Chandler	1
Marshall County	**1**
Madill	1
Mayes County	**2**
Chouteau	1
Pryor	1
McIntosh Couty	**2**
Checotah	1
Eufaula	1
Murray County	**1**
Sulphur	1
Muskogee County	**16**
Boynton	1
Haskel	2
Muskogee	12
Porum	1
Okfuskee County	**1**
Okemah	1
Oklahoma Couty	**58**
Bethany	1
Choctaw	1
Del City	2
Edmond	5
Jones	1
Luther	1
Midwest City	3
Newalla	3
Oklahoma City	41
Okmulgee County	**3**
Henryetta	2
Okmulgee	1
Osage County	**11**
Fair Fax	1
Pawhuska	6
Skiatook	4
Ottawa County	**5**
Commerce	1
Fairland	1
Miami	3
Pawnee County	**5**
Pawnee	4
Perkins	1
Payne County	**4**
Cushing	1
Stillwater	2
Yale	1
Pittsburg County	**4**
Hartshorne	1
McAlester	3
Pontotoc County	**9**
Ada	6
Fittstown	1
Roff	1
Stonewall	1
Pottawatomie County	**16**
McLoud	1
Shawnee	12
Tecumseh	3
Rogers County	**4**
Catoosa	2
Claremore	1
Inola	1
Seminole County	**6**
Seminole	6
Sequoyah County	**3**
Park Hill	1
Vian	1
Sallisaw	1
Stephens County	**3**
Duncan	3
Tulsa County	**65**
Bixby	1
Broken Arrow	6
Glen Pool	1
Owasso	1
Tulsa	56
Vagoner County	**2**
Wagoner	2
Washington Couty	**7**
Bartlesville	7

Graphic 4.4

NUMBER OF INDIAN-OWNED BUSINESSES,
BY FEDERALLY-RECOGNIZED INDIAN TRIBAL LOCATIONS



OTTAWA AREA:

Cayuga
Miami
Modoc
Ottawa
Peoria
Quapaw
Seneca
Wyandotte

TYPES OF ECONOMIC ACTIVITY: The number and percent of active Indian-owned businesses in Oklahoma, by major categories of the Standard Industrial Classification System, are provided in Graphics 4.5, below, and 4.6, on page 33 of this report. These graphics show that 35.5% of all Indian-owned businesses in Oklahoma are found in Construction and that 64.7% are accounted for by the categories of Construction, Retail Trade, and Business and Repair Services. Mining; Agriculture, Forestry, and Fisheries; and Manufacturing account for only 11.3% of all Indian-owned businesses. Less that 20% of Indian-owned businesses are found in Professional and Related Services; Personal Services; Transportation, Communications, and Other Public Utilities; Finance, Insurance, and Real Estate; and Entertainment and Recreation Services.

Graphic 4.5

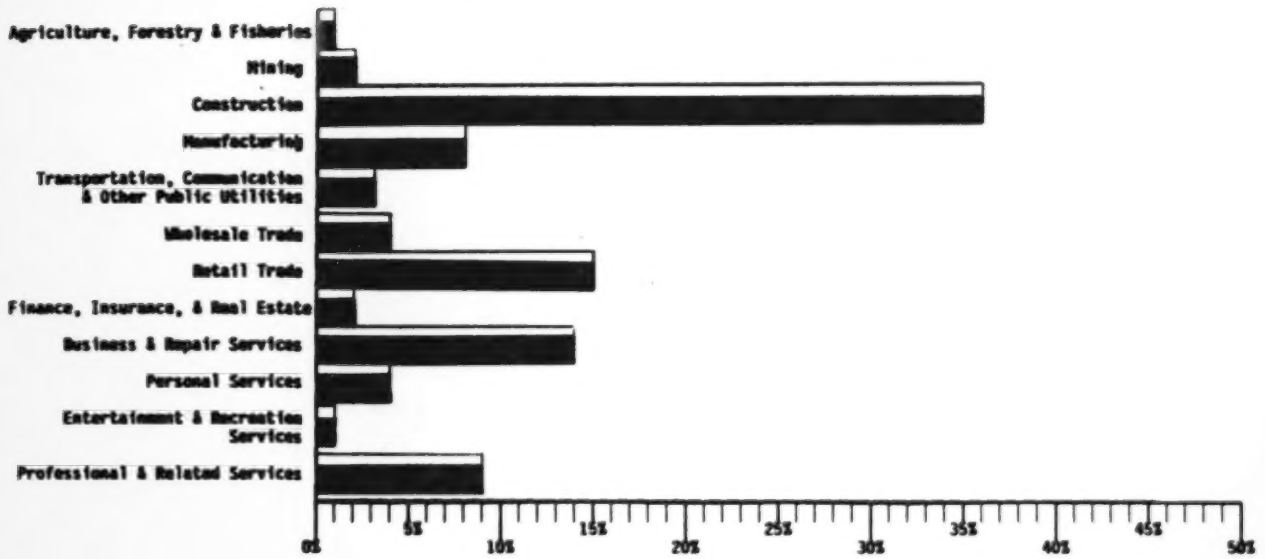
NUMBER AND PERCENT OF INDIAN-OWNED BUSINESSES, BY MAJOR STANDARD INDUSTRIAL CLASSIFICATION SYSTEM CATEGORIES

Standard Industrial Classification System Category	Total Number of Businesses	Percent of Indian-Owned Businesses in Each Standard Industrial Classification System Category
Agriculture, Forestry and Fisheries	5	1.4%
Mining	8	2.2%
Construction	129	35.5%
Manufacturing	28	7.7%
Transportation, Communications, & Other Public Utilities	11	3.0%
Wholesale Trade	15	4.1%
Retail Trade	54	14.9%
Finance, Insurance & Real Estate	9	2.5%
Business & Repair Services	52	14.3%
Personal Services	16	4.4%
Entertainment & Recreation Services	3	0.8%
Professional & Related Services	32	8.8%

Total Number of Businesses: 363

Graphic 4.6

PERCENT OF INDIAN-OWNED BUSINESSES,
BY STANDARD INDUSTRIAL CLASSIFICATION SYSTEM CATEGORIES



The distribution of Indian-owned firms by Standard Industrial Classification System category differs from the distribution of all firms in Oklahoma in several ways. The most striking difference is in Construction. While all construction firms in Oklahoma account for only 9% of all business establishments in the state, approximately 36% of all Indian-owned businesses are found in this industry. There is also a higher concentration of Indian-owned businesses in Business and Repair Services and in Professional and Related Services -- almost twice as high as for the total population of business owners in Oklahoma.

Of course, relatively higher concentrations in some sectors must be offset by relatively lower concentrations in other sectors. In Oklahoma, most of the relatively higher concentrations in the sectors mentioned in the preceeding paragraph are offset by relatively lower concentrations of ownership by Indians in the Wholesale and Retail Trade sectors.

Graphic 4.7, on page 34, presents a more detailed breakdown of the economic activity of Indian-owned businesses by specific types of businesses within each of the twelve aggregate categories of the Standard Industrial Classification System presented in Graphics 4.5 and 4.6.

Graphic 4.7

DETAILED BREAKDOWN SHOWING NUMBER OF OKLAHOMA INDIAN-OWNED BUSINESSES, BY MAJOR & MINOR STANDARD INDUSTRIAL CLASSIFICATION SYSTEM CATEGORIES*

Agriculture, Forestry and Fisheries	5
Horticultural Services (078)	5
Mining	8
Metal Mining (10)	1
Crude Petroleum and natural gas extraction (13)	7
Construction (15, 16, 17)	129
Manufacturing	28
Apparel and accessories except knit (231-238)	1
Miscellaneous Paper and Pulp Products (264)	1
Printing, publishing and allied industries (272-279)	6
Plastics, synthetics, resins (282)	1
Industrial and Miscellaneous chemicals (281, 286, 289)	2
Miscellaneous plastics products (307)	1
Miscellaneous wood products (244, 249)	3
Furniture and fixtures (25)	1
Pottery and related products (326)	1
Cutlery, hand tools and other hardward (342)	2
Fabricated structural metal products (344)	3
Radio, TV and communication equipment (365, 366)	1
Not specified electrical machinery equipment and supplies	3
Cycles and Miscellaneous transportation equipment (375, 379)	1
Not specified manufacturing industries	1
Transportation, Communications and Other Public Utilities	11
Bus service and urban transit (41, except 412)	1
Trucking Service (421, 423)	7
Air transportation (45)	1
Not specified utilities	2
Wholesale Trade	15
Lumber and construction materials (503)	1
Metals and Minerals, except Petroleum (505)	1
Hardware, plumbing and heating supplies (507)	1
Machinery, equipment and supplies (508)	5
Miscellaneous wholesale durable goods (5094, 5099)	1
Drugs, chemicals and allied products (512, 516)	1
Groceries and related products (514)	1
Petroleum products (517)	5
Miscellaneous wholesale, nondurable goods (5194, 5198, 5199)	1
Retail Trade	54
Lumber and building material retailing (521, 523)	1
Variety stores (533)	1
Miscellaneous general merchandise stores (539)	6
Retail bakeries (546)	1
Auto and home supply stores (553)	1
Gasoline service stations (554)	1
Apparel and accessory stores, except shoe (56, except 566)	2
Furniture and home furnishings stores (571)	6
Household appliances, TV and radio stores (572, 573)	1
Eating and drinking places (58)	10
Sporting goods, bicycles, hobby stores (5941, 5945, 5946)	1
Retail Florists (5992)	1
Miscellaneous retail stores (593, 5947, 5948, 5993, 5994, 5999)	14
Not specified retail trade	8
Finance, Insurance and Real Estate	9
Banking (60)	1
Insurance (63, 64)	7
Real Estate, including real estate-insurance-law offices (65, 66)	1
Business and Repair Services	52
Advertising (731)	1
Services to dwellings and other buildings (734)	30
Business management and consulting services (7392)	7
Computer and data processing services (737)	1
Detective and protective services (7393)	2
Business services n.e.c. (732, 733, 735, 7394, 7395, 7396, 7399)	3
Automotive services except repair (751, 752, 754)	3
Automotive repair stores (753)	5
Personal Services	16
Hotels and motels (701)	2
Laundry, cleaning and garment services (721)	3
Beauty shops (723)	4
Barber shops (724)	1
Dressmaking shops (pt 729)	2
Miscellaneous personal services (722, pt 729)	4
Entertainment and Recreation Services	3
Miscellaneous entertainment and recreation services (791, 794, 799)	3
Professional and Related Services	32
Legal Services (81)	10
Educational Services n.e.c. (829)	1
Museums, art galleries and zoos (84)	3
Engineering, architectural, and surveying services (891)	14
Accounting, auditing and bookkeeping services (893)	1
Miscellaneous professional and related services (899)	3

* This table does not list the categories of the Standard Industrial Classification System for which there were no Indian-owned businesses listed in the Indian Business Directory.

This table provides greater insight into the specific types of economic activity in which Indian-owned businesses are engaged. For example, 57.7% of the Indian-owned businesses in the Business and Repair Services sector are involved in services to dwellings and other buildings, while only 3.8% of the Indian-owned businesses operating in this sector are active in advertising or computer and data processing services. Likewise, if we consider the 11 Indian-owned businesses active in the Transportation, Communications and Other Public Utilities sector, we note that 7 (63.6%) are involved trucking service, while only 2 (18.2%) are involved in bus service, urban transit, and air transportation.

Graphic 4.7 clearly shows that Oklahoman's American Indian entrepreneurs are involved in a wide range of businesses. Outside of the relatively heavy concentration of ownership in Construction, noted above, a comparison with a similarly detailed distribution of all Oklahoma business firms (not shown) indicates a relatively greater ownership by American Indians of businesses which provide services to dwellings and other buildings, as well as engineering, architectural, and survey services.

NUMBER OF EMPLOYEES: Graphic 4.8, on page 36, provides information concerning the employees of Indian-owned businesses. Whereas information provided thus far in Section Four of this report was derived from an analysis of the Indian Business Directory (See Section Two), the information in Graphics 4.8 through 4.12 was drawn from the responses of 146 Indian-owned businesses to a mail survey of all businesses listed in the Indian Business Directory.

Employee information was reported by 142 of the 146 Indian-owned businesses responding to the survey. The table presented in Graphic 4.8 shows the total number of persons employed by Indian-owned businesses in each of the twelve aggregate Standard Industrial Classification System categories.

In addition, this table provides information on the average number of employees per firm, and the percent of Indian-owned business employees who are employed in each of the sectors.

Graphic 4.8

NUMBER OF PERSONS EMPLOYED IN INDIAN-OWNED BUSINESSES, BY STANDARD INDUSTRIAL CLASSIFICATION SYSTEM CATEGORIES*

Business Category	Number of Employees	Number of Businesses Reporting	Average Number of Employees Per Firm	Percentage of Total Employees in Each Standard Industrial Classification System Category
Agriculture, Forestry & Fisheries	78.5	2	39.3	2.7%
Mining (Crude Petroleum)	8.0	2	4.0	0.3%
Construction	1309.0	49	26.7	44.8%
Manufacturing	779.5	16	48.7	26.7%
Transportation, Communication, & Other Public Utilities	64.5	6	10.8	2.2%
Wholesale Trade	107.0	10	10.7	3.7%
Retail Trade	124.5	20	6.2	4.3%
Finance, Insurance & Real Estate	54.0	4	13.5	1.8%
Business & Repair Services	240.5	19	12.7	8.2%
Personal Services	19.0	2	9.5	0.6%
Professional & Related Services	140.0	12	11.7	4.8%
TOTAL NUMBER OF EMPLOYEES	2924.5			

Note: In some instances Indian-owned businesses responding to the survey question asking their total number of employees indicated a range in the number of employees. In these cases an average was calculates. For example, a business reporting 3-6 employees would be recorded as having 4.5 employees.

* No survey forms were returned by Indian-owned businesses in the Standard Industrial Classification Category entitled, "Entertainment and Recreation Services." Therefore, that classification is not included in this table.

This table indicates that Manufacturing; Agriculture, Forestry and Fisheries; and Construction have the largest firms in terms of employees, and that nearly three-fourths (74.2%) of all employees of Indian-owned businesses are concentrated in these three sectors. In contrast, less than 10% of all employees of Indian-owned businesses are working in the Finance, Insurance and Real Estate; Personal Services; and Professional and Related Services

sectors. This distribution is not surprising, given the distribution of number of firms by Standard Industrial Classification System categories discussed above.

A comparison of the column four figures on average number of employees per firm with the number of employees per firm for all business in Oklahoma (not shown) reveals some sharp differences in average firm size. As measured by employees per firm, Indian-owned firms are significantly larger than all Oklahoma firms in Agriculture, Forestry and Fisheries (39.3 versus 6.9), and in Construction (26.7 versus 10.2); and they are significantly smaller than all firms in Mining (4 versus 27.6); Transportation, Communications, and Public Utilities (10.8 versus 30); and Retail Trade (6.2 versus 12).

DOLLAR VOLUME OF PAYROLL: Information on the payroll of Indian-owned businesses responding to the survey is contained in Graphic 4.9, below.

Graphic 4.9

DOLLAR VOLUME OF PAYROLL FOR INDIAN-OWNED BUSINESSES, BY STANDARD INDUSTRIAL CLASSIFICATION SYSTEM CATEGORIES*

Business Category	Total Annual Payroll Reported	Number of Businesses Reporting on Payroll	Average Payroll Per Firm	Percent of Total Payroll Accounted for in Each Standard Industrial Classification System Category
Agriculture, Forestry & Fisheries	$ 500,000	1	$ 500,000	1.2%
Mining (Crude Petroleum)	85,000	1	85,000	0.2%
Construction	20,837,868	48	434,122	48.1%
Manufacturing	10,468,450	16	654,278	24.2%
Transportation, Communication, & Other Public Utilities	402,000	5	80,400	0.9%
Wholesale Trade	2,083,605	10	208,360	4.8%
Retail Trade	1,591,564	18	88,420	3.7%
Finance, Insurance & Real Estate	1,138,000	4	284,500	2.6%
Business & Repair Services	3,146,622	16	196,664	7.3%
Personal Services	207,963	2	103,981	0.5%
Professional & Related Services	2,851,500	10	285,150	6.6%
TOTAL DOLLAR VOLUME OF PAYROLL	$43,312,572			

* No survey forms were returned by Indian-owned businesses in the Standard Industrial Classification System category entitled, "Entertainment and Recreation Services." Therefore, that classification is not included in this table.

Payroll information was reported by 131 of the 146 Indian-owned businesses which completed and returned the survey.

The table provided in Graphic 4.9, reports Indian-owned business payroll for each of the major economic sectors contained in the Standard Industrial Classification System. This table indicates a total payroll of $43,312,572 for the 131 Indian-owned businesses responding to the payroll question. From these figures, average payroll per firm, and the percent of all Indian-owned business payroll which is generated within each of the twelve economic sectors are calculated.

As might be expected, these payroll figures are closely correlated with the data on number of employees. Accordingly, almost three-fourths of all payroll (73.5%) is accounted for by the Construction; Manufacturing; and Agriculture, Forestry, and Fisheries sectors.

Because Indian-owned construction firms are larger, on the average, than non-Indian-owned construction firms, it is not surprising that the former also have much larger payrolls per firm than the latter ($434,000 versus $177,000). The same relationships holds for firms in Finance, Insurance and Real Estate ($284,000 versus $182,000); and Business Repair Services ($197,000 versus $130,000). However, payroll per firm by Indian-owned businesses in Manufacturing is much smaller relative to payroll per firm for all manufacturing businesses than one would expect from a comparison of average number of employees alone ($654,000 versus $1,080,000). A similar relationship also holds for Transportation, Communications, and Public Utilities ($80,000 versus $591,000). This suggests a concentration of ownership by American Indians in relatively low wage businesses in these sectors. However, further study would be required to determine whether this is in fact the case.

DOLLAR VOLUME OF GROSS SALES: Information on the dollar volume of gross sales for Indian-owned businesses is drawn from the reporting by 125 of the 146 Indian-owned businesses which responded to the survey. Data on gross sales is presented in Graphic 4.10, below.

Graphic 4.10

DOLLAR VOLUME OF GROSS SALES FOR INDIAN-OWNED BUSINESSES, BY STANDARD INDUSTRIAL CLASSIFICATION SYSTEM CATEGORIES *

Business Category	Dollar Volume of Gross Sales	Number of Businesses Reporting Gross Sales	Average Gross Sales Per Firm	Percent of Total Gross Sales in Each Standard Industrial Classification System Category
Agriculture, Forestry & Fisheries	$ 1,025,000	1	$ 1,025,000	0.3%
Mining (Crude Petroleum)	1,500,000	1	1,500,000	0.4%
Construction	176,292,668	49	3,597,810	49.0%
Manufacturing	103,867,593	10	10,386,759	28.9%
Transportation, Communication & Other Public Utilities	1,306,000	5	261,200	0.4%
Wholesale Trade	46,473,341	8	5,809,168	12.9%
Retail Trade	8,488,500	19	446,763	2.4%
Finance, Insurance & Real Estate	5,195,000	4	1,298,750	1.4%
Business & Repair Services	9,562,667	16	597,667	2.7%
Personal Services	516,757	2	258,379	0.1%
Professional & Related Services	5,723,000	10	572,300	1.6%
TOTAL DOLLAR VOLUME OF GROSS SALES	**$359,950,526**			

* No survey forms were returned by Indian-owned businesses in the Standard Industrial Classification System category entitled, "Entertainment and Recreation Services." Therefore, that classification is not included in this table.

This graphic provides a table which indicates gross sales for Indian-owned businesses for each of the economic sectors identified in the Standard Industrial Classification System. The total of all gross sales reported in the survey is $359,950,526. Also presented in Graphic 4.10 are figures which indicate the average gross sales per firm and the percentage of the gross sales by Indian-owned businesses which are accounted for by each of the twelve economic sectors of the Standard Industrial Classification System.

According to the figures provided in this table, Construction (49.0%) and Manufacturing (28.9%) account for 77.9% of all gross sales reported by the Indian-owned businesses surveyed. Wholesale Trade accounts for another 12.9%. Based on these figures, all other business sectors account for only 9.3% of the total gross sales by Indian-owned businesses participating in the survey.

It is difficult to draw any inferences about Indian-owned firms from these data, alone. However, they can be combined with the data on payroll to determine the percentage of sales receipts that are paid as wages. The latter can then be compared with similar data for all Oklahoma businesses (not shown) to see if there are any significant differences between Indian-owned and non-Indian-owned firms.

Payroll as a percent of sales receipts is significantly less for Indian-owned firms than for all firms in Oklahoma in three sectors -- Construction (12% versus 18%), Manufacturing (10% versus 17%), and Wholesale Trade (4% versus 7%) -- and significantly larger for Indian-owned firms in Retail Trade (19% versus 12%). The former cases suggest either less labor intensity or lower wages in Indian-owned businesses, while the latter case suggests relatively greater labor intensity or higher wages in Indian-owned firms.

Given that Indian-owned construction firms are much larger, on the average, than non-Indian-owned construction firms, the former are probably characterized by the payment of lower wages per employee than the latter. The opposite seems to be true in Retail Trade, where Indian-owned firms are significantly smaller than non-Indian-owned firms. It is not possible to draw any such inferences for Manufacturing and Wholesale Trade from the survey data.

PERCEIVED EFFECTS OF INDIAN-OWNED BUSINESSES ON OKLAHOMA TOURISM:

Indian-owned businesses receiving the survey were asked their perceptions as to whether their business activities affected tourism in Oklahoma communities. Those businesses which indicated a positive response to this tourism question were then asked to provide an estimate of the dollar volume of tourism generated in their community by the presence of their business.

Graphic 4.11, below, presents a table which indicates the number of Indian-owned businesses which perceived that their economic activities generate tourism in their communities. This table also provides the city

Graphic 4.11

NUMBER AND LOCATION OF INDIAN-OWNED BUSINESSES INDICATING THEY HELP TO GENERATE TOURISM IN OKLAHOMA COMMUNITIES

City (County)	Number of Indian-Owned Businesses Helping to Generate Tourism in Oklahoma	Estimated Dollar Volume of Tourism Generated By the Presence of Indian-Owned business(es)
Ardmore (Carter)	3	$ 200,000 **
Anadarko (Caddo)	1	2,000
Broken Arrow (Tulsa)	1	18,000
Carnegie (Caddo)	1	3,000
Durant (Bryan)	1	* * *
Lawton (Comanche)	2	119,500
Muskogee (Muskogee)	1	* * *
Norman (Cleveland)	1	120,000
Oklahoma City (Oklahoma)	1	100,000
Pawhuska (Osage)	1	* * *
Pryor (Mayes)	1	* * *
Shawnee (Pottawatomie)	1	1,000,000
Tahlequah (Cherokee)	1	100,000
TOTAL OKLAHOMA COMMUNITIES AFFECTED: 13	**TOTAL NUMBER OF BUSINESSES 16***	**$1,662,500**

* The percent of businesses responding to the survey and reporting they help to generate tourism in Oklahoma communities was 10.9%.

** While three businesses indicated they help to generate tourism, only one of these provided an estimated dollar volume of tourism.

*** No estimated dollar volume of tourism was provided.

(and county) locations in which Indian-owned businesses perceive that they help to generate tourism, as well as an estimated dollar volume of tourism generated by the presence of Indian-owned business(es) in these communities.

A total of 16 of the 146 Indian-owned businesses responding to the survey indicated a positive response to the tourism question. This represents 10.9% of the businesses responding to the survey. Thirteen Oklahoma cities were identified in these responses as receiving tourism benefits. These cities (and counties) are identified in Graphic 4.11, and an estimated dollar volume of the tourism generated by these Indian-owned businesses is provided. As this table indicates, some of the businesses which responded positively to the tourism question did not provide an estimated dollar figure.

Graphic 4.12, on page 43, provides a bar chart indicating the estimated dollar volume of tourism generated in Oklahoma communities by those Indian-owned businesses which provided an estimate of the dollar volume of business generated by their business(es). Dollar estimates for Shawnee, Ardmore, Norman, Lawton, Oklahoma City, Tahlequah, Broken Arrow, Carnegie, and Anadarko are presented in this table.

Probably the most significant aspect of this part of the survey is the small degree to which Indian business owners are engaged in providing goods and services to tourists. Although there are no comparable data for all businesses in Oklahoma, tourism is widely believed to be a larger contributor to the state's economy than these data indicate it to be for Indian-owned firms.

ECONOMIC AND BUSINESS PROFILE OF FEDERALLY-RECOGNIZED INDIAN TRIBES IN OKLAHOMA:

The thirty-one federally-recognized tribes listed in Appendix Three were asked to complete a survey form providing a summary economic and business profile.

Graphic 4.12

ESTIMATED DOLLAR VOLUME OF TOURISM GENERATED BY THE PRESENCE OF INDIAN-OWNED BUSINESSES IN SELECTED OKALHOMA COMMUNITIES

Note: While Indian-owned businesses in Durant, Muskogee, Pawhuska, and Pryor also reorted helping to generate tourism in these communities, no estimated dollar amount was provided.

Items for which information was requested included the dollar volume of tribal budgets; the total number of persons employed by the tribal government; the total dollars received by the tribe in federal and/or state assistance; the dollar volume of gross sales for businesses owned by the tribe; the total number of persons employed by tribally-owned businesses; a perception as to whether tourism was generated in Oklahoma communities by tribal cultural activities and/or businesses owned by the tribe; and an estimated total of dollar volume of tourism generated by their tribal and cultural activities and/or businesses.

Graphic 4.13, on page 45, presents figures provided by the 16 Indian tribes which responded to the tribal economic and business survey. Responses to this survey were received by 51.6% of the tribes surveyed.

Information presented in Graphic 4.13 indicates a total of $49,097,644 in Indian tribal budgets, and a total of 2,253 employees for the Indian tribal governments responding to the survey. The dollar volume of federal and state domestic assistance reported was $80,737,489.

Gross sales reported by the sixteen tribes for tribally-owned businesses was $52,012,036, with 863 persons reported as being employed in tribally-owned businesses.

Ten of the 16 tribes responding to the tribal survey reported a perception that their tribal cultural activities and/or tribally-owned businesses generate tourism for adjacent Oklahoma communities. The dollar volume of tourism so generated was estimated at $4,569,882.

These data are too fragmentary to serve as a basis for drawing any comparison between tribal governments and their non-Indian counterparts in Oklahoma. A comparison of tribally-owned businesses with businesses owned by individual Indians, however, shows that tribally-owned businesses are more labor intensive than are those owned by individual Indians, as measured by

Graphic 4.13

ECONOMIC AND BUSINESS PROFILE *
OF INDIAN TRIBES IN OKLAHOMA

Dollar Total of Tribal Budgets Reported	$49,097,644
Total Number of Persons Employed By Indian Tribal Governments	2,253
Dollar Total of Federal and/or State Assistance Reported	$80,737,489
Dollar Total of Annual Gross Sales Reported for Tribally-Owned Businesses	$52,012,036
Total Number of Persons Employeed By Tribally-Owned Businesses	863
Number of Tribes Reporting Tourism is Generated by Tribal Cultural Activities and/or Tribally-Owned Businesses	10
Estimated Dollar Total of Tourism Generated By Tribal Cultural Activities and/or Tribally-Owned Businesses	$4,569,882

* Tribal leaders of 31 federally-recognized Indian tribes in Oklahoma were surveyed. The figures provided in Graphic 4.13, above, are based on responses received from 16 of the Indian tribes surveyed.

sales per employee ($60,269 and $123,060, respectively). Tribally-owned businesses are also more labor intensive than all Oklahoma enterprises, which register $126,953 in sales per employee, and they are more heavily involved in meeting the demands of tourists than are businesses owned by individual Indians.

PROFILE OF FEDERAL INDIAN DOMESTIC ASSISTANCE IN OKLAHOMA:

The profile of federal Indian domestic assistance in Oklahoma, which appears on pages 46 through 54 of this report, was developed using the data sources and methodology described in Section Two.

Graphic 4.14, on page 47, provides a summary budget breakdown indicating the total level of federal Indian domestic assistance provided nationally by federal departments and agencies for the 1986 fiscal year and projected for the 1987 fiscal year. The accompanying table provided in Graphic 4.15, also on page 47, presents comparable information for the state of Oklahoma. These tables indicate that Oklahoma received a total of $272,994,445 of the $3,052,754,000 in federal Indian domestic assistance for the 1986 fiscal year (8.9%); and is projected to receive $299,894,264 of the $2,983,833,000 in federal Indian domestic assistance projected for the 1987 fiscal year (10.1%). They also show that the Department of the Interior, the Department of Health and Human Services, the Department of Education, the Department of Housing and Urban Development, the Department of Agriculture, the Department of Transportation, and the Department of Labor account for the bulk of the current levels of federal Indian domestic assistance.

From these two tables the Oklahoma "share" of total federal Indian domestic assistance can be calculated. For example, Oklahoma received $51,384,000 of the total of $1,084,551,000 in federal Indian domestic assistance administered by the Department of the Interior for the 1986 fiscal year, or 4.7%; and is projected to receive $53,212,000 of the $1,088,394,000 projected for fiscal year 1987, or 4.9%. In a similar manner the percentage "share" which Oklahoma's federal Indian domestic assistance constitutes of all federal Indian domestic assistance can be calculated for each of the federal departments and agencies cited in Graphics 4.14 and 4.15.

Graphic 4.14

SUMMARY BUDGET BREAKDOWN FOR FEDERAL INDIAN DOMESTIC ASSISTANCE, UNITED STATES

Department	Fiscal Year 1986	Fiscal Year 1987
Department of the Interior	$1,084,551,000	$1,088,394,000
Department of Health & Human Services	957,960,000	979,855,000
Department of Agriculture	91,552,000	95,699,000
Department of Education	342,393,000	360,028,000
Department of Labor	71,133,000	75,124,000
Department of Housing & Urban Development	384,586,000	290,109,000
Department of the Treasury	9,891,000	----
Department of Commerce	4,570,000	4,295,000
Department of Transportation	95,700,000	80,000,000
Environmental Protection Agency	2,900,000	2,900,000
Small Business Administration	7,229,000	7,229,000
Department of Energy	289,000	200,000
TOTAL FEDERAL INDIAN DOMESTIC ASST.	**$3,052,754,000**	**$2,983,833,000**

Graphic 4.15

SUMMARY BUDGET BREAKDOWN FOR FEDERAL INDIAN DOMESTIC ASSISTANCE, STATE OF OKLAHOMA

Department	Fiscal Year 1986	Fiscal Year 1987
Department of the Interior	$ 51,384,000	$ 53,212,000
Department of Health & Human Services	109,804,000	104,415,000
Department of Agriculture	21,649,449	27,148,583
Department of Education	29,205,996	31,665,681
Department of Labor	7,606,000	8,299,000
Department of Housing & Urban Development	44,503,000	66,778,000
Department of Treasury	1,332,000	----
Department of Commerce	495,000	298,000
Department of Transportation	5,662,000	6,724,000
Environmental Protection Agency	*	*
Small Business Administration	1,250,000	1,250,000
Department of Energy	103,000	104,000
TOTAL FEDERAL INDIAN DOMESTIC ASST.	**$ 272,994,445**	**299,894,264**

* Agency monitors funding on a regional basis and does not collect information by state.

Graphic 4.16, on pages 49 and 50, provides a more detailed breakdown of national federal Indian domestic assistance for bureaus and programs within each federal department or agency. This table indicates the relative priority of various bureaus and programs, as measured by the total dollars of federal Indian domestic assistance administered by each such bureau or program. In instances where identical amounts are provided for both the 1986 and 1987 fiscal years, this indicates that no change in the 1986 funding level is projected for the 1987 fiscal year. From this table, we note that the bulk of all federal Indian domestic assistance administered by the Department of the Interior is administered through the Bureau of Indian Affairs. Similarly, the relative priority of other bureaus and programs can be determined from Graphic 4.15. Kindly note that Appendices Four, Five, and Six provide yet further programmatic breakdowns for federal Indian domestic assistance administered nationally through the Department of the Interior, the Indian Health Service, and the Department of Education, respectively.

Graphic 4.17, on pages 51 and 52, serves as a companion graphic to Graphic 4.16, providing a more detailed breakdown of federal Indian domestic assistance to Oklahoma for bureaus and programs within each federal department or agency. This table shows the relative priority given to various bureaus and programs in Oklahoma, as measured by the total dollars of federal Indian domestic assistance which enter Oklahoma through the bureaus and programs of federal departments and agencies. Again, in instances where identical amounts are provided for both the 1986 and 1987 fiscal years, this indicates that no change in the 1986 funding level is projected for the 1987 fiscal year. Please note that an explanation of the footnotes used in this table appears at the end of the table.

A further look at the data in Graphic 4.15 and the more detailed breakdowns of the national data in Appendices Four through Six, indicates

Graphic 4.16

DETAILED BUDGET BREAKDOWN FOR FEDERAL INDIAN DOMESTIC ASSISTANCE, UNITED STATES

Department	Fiscal Year 1986	Fiscal Year 1987
Department of the Interior:	**$1,084,551,000**	**$1,088,394,000**
Bureau of Indian Affairs	1,005,693,000	1,018,835,000
Office of Surface Mining	2,274,000	2,199,000
Bureau of Reclamation	60,600,000	51,383,000
Bureau of Land Management	8,000,000	8,170,000
Mineral Management Service	6,782,000	7,050,000
Geological Survey	880,000	425,000
See Appendix Four for more complete breakdown.		
Department of Health and Human Services:	**$957,960,000**	**$979,855,000**
Indian Health Service	867,115,000	885,019,000
Headstart	35,819,000	39,415,000
Administration for Native Americans	27,742,000	28,989,000
Low Income Energy Assistance	16,249,000	14,800,000
Community Services	1,600,000	1,700,000
Grants to Indian Tribes - Older Americans	7,178,000	7,500,000
National Health Services Corp	708,000	823,000
Family Planning Services	981,000	1,025,000
Maternal & Child Health	339,000	339,000
Preventive Health Service	29,000	29,000
Alcohol, Drug Abuse & Mental Health	200,000	216,000
See Appendix Five for more complete breakdown.		
Department of Agriculture:	**$91,552,000**	**$95,699,000**
Commodities in Lieu of Food Stamps	54,006,000	56,432,000
Elderly Feeding Program	712,000	700,000
Special Supplemental Food Program	25,036,000	25,809,000
Indian Land Acquisition	1,400,000	2,000,000
School Lunch Program	10,398,000	10,758,000
Department of Education:	**$342,393,000**	**$360,028,000**
Elementary & Secondary Education	305,636,000	312,189,000
Postsecondary Education	3,038,000	3,274,000
Special Education/ Rehabilitative Services	12,858,000	21,833,000
Bilingual Education	9,639,000	10,511,000
Vocational & Adult Education	9,564,000	10,414,000
Libraries Program	1,658,000	1,807,000
See Appendix Six for more complete breakdown.		

Graphic 4.16 (continued)

(Detailed Budget Breakdown for Federal Indian Domestic Assistance, United States)

	Fiscal Year 1986	Fiscal Year 1987
Department of Labor:	**$71,133,000**	**$75,124,000**
Native Americans Employment & Training	59,567,000	61,484,000
Summer Youth Employment & Training	11,566,000	13,640,000
Department of Housing and Urban Development:	**$384,586,000**	**$290,109,000**
Community Development Block Grants	25,839,000	27,000,000
Indian Housing Construction	299,547,000	169,609,000
Indian Housing Operating Subsidies, Modernization	59,200,000	93,500,000
Department of Treasury:	**$9,891,000**	**----**
Revenue Sharing (Program Ended 12-31-86)	9,891,000	----
Department of Commerce:	**$4,570,000**	**$4,295,000**
Economic Development Administration	3,000,000	3,000,000
Minority Business Development Agency	1,570,000	1,295,000
Department of Transportation:	**$95,700,000**	**$80,000,000**
Indian Reservation Roads	95,700,000	80,000,000
Environmental Protection Agency:	**$2,900,000**	**$2,900,000**
Agency monitors funding on a regional basis, by project; amounts represent the EPA estimate for all projects. EPA expects some increase in 1987 for Clean Water Act program.		
Small Business Administration:	**$7,229,000**	**$7,229,000**
Financial & Investment Assistance	7,229,000	7,229,000
Includes: 6 direct loans totalling $329,000 and 51 guaranteed loans totalling $6,900,000.		
Department of Energy:	**$289,000**	**$200,000**
Council of Energy Resources Tribes	289,000	200,000
TOTAL FEDERAL INDIAN DOMESTIC ASST	**$3,052,754,000**	**$2,983,833,000**

Graphic 4.17

DETAILED BUDGET BREAKDOWN OF FEDERAL INDIAN DOMESTIC ASSISTANCE, STATE OF OKLAHOMA

Department	Fiscal Year 1986	Fiscal Year 1987
Department of the Interior:	**$ 51,384,000**	**$ 53,212,000**
Bureau of Indian Affairs	$ 47,531,000	$ 49,257,000
Office of Surface Mining	- 0 -	- 0 -
Bureau of Reclamation	- 0 -	- 0 -
Bureau of Land Management	890,000	898,000
Mineral Management Service	2,937,000	3,053,000
Geological Survey	26,000	4,000
National Park Service	- 0 -	- 0 -
Department of Health & Human Services:	**$109,804,000**	**$104,415,000** [1]
Indian Health Service	103,548,000	98,159,000
Headstart	2,838,000	2,838,000
Administration for Native Americans	1,801,000	1,801,000
Low Income Energy Assistance	- 0 -	- 0 -
Community Services	- 0 -	- 0 -
Grants to Indian Tribes - Older Americans	1,529,000	1,529,000
National Health Services Corps	- 0 -	- 0 -
Family Planning Services	88,000	88,000
Maternal & Child Health	- 0 -	- 0 -
Preventive Health Service	- 0 -	- 0 -
Alcohol, Drug Abuse & Mental Health	- 0 -	- 0 -
Department of Agriculture:	**21,649,449**	**27,148,583**
Commodities in Lieu of Food Stamps	6,171,922	6,910,235
Elderly Feeding Program	192,629	276,203
Needy Family Programs	9,732,997	7,354,209
Special Supplemental Food Program	5,551,901	12,607,936
Indian Land Acquisition	*	*
School Lunch Program	**	**
Department of Education:	**$29,205,996**	**$31,665,681**
Direct Grants to Oklahoma	2,978,000	2,978,000
Supplemental Services for Indian Children (Title IV-A)	9,671,871	9,671,871
Johnson O'Malley (JOM)	486,992	300,000
Impact Aid-874 (Restricted Indian Land & Tribal Housing)	14,069,133	16,715,810
Bilingual Education (Title VII)	2,000,000	2,000,000
Educationally Disadvantaged Children (Chapter I)	**	**
Block Grants to Schools(Chapter II)	**	**
School Lunch Program	**	**

Graphic 4.17 (continued)

(Detailed Breakdown of Federal Indian Domestic Assistance, State of Oklahoma)

	Fiscal Year 1986	Fiscal Year 1987
Department of Labor:	**$7,606,000**	**$8,299,000**
Native Americans Employment & Training	5,025,000	5,254,000
Summer Youth Employment & Training	2,581,000	3,045,000
Department of Housing & Urban Development:	**$44,503,000**	**$66,778,000** [2]
Community Development Block Grants	4,063,000	4,050,000
Indian Housing Construction	32,500,000	47,500,000
Indian Housing Operating Subsidies, Modernization	7,940,000	15,228,000
Department of the Treasury:	**$1,332,000**	**- 0 -**
Revenue Sharing	1,332,000	- 0 -
Department of Commerce:	**$495,000**	**$298,000**
Economic Development Administration	337,000	35,000
Minority Business Development Agency	158,000	263,000
Department of Transportation:	**$5,662,000**	**$6,724,000**
Indian Reservation Roads	5,662,000	6,724,000
Environmental Protection Agency:	*	*
Pesticides Enforcement		
Municipal Sewage Treatment Construction		
Small Business Administration:	**$1,250,000**	**$1,250,000**
Financial & Investment Assistance (Direct Loans $50K, Guaranteed Loans $1,200K)		
Department of Energy:	**$ 103,000**	**$ 104,000**
Council of Energy Resources Tribe	103,000	104,000
TOTAL FEDERAL INDIAN DOMESTIC ASST.	**$272,994,445**	**$299,894,264**

Footnotes: * Data Not Available

** These programs are for all school-age children. While many American Indian children participate in these programs, no exact dollar figure could be provided.

1- The amount reported is as of April 1987. The total for Fiscal Year 1987 is expected to reflect a slight increase over Fiscal Year 1986.

2- Estimate based on historical trend.

that the federal government invested its funds for Indian assistance for three primary purposes: the development of human capital, the provision of essential physical capital, and the development of natural resources. Nearly two-thirds of total federal expenditures went for programs in health, education and employment -- three key investments in human capital. Another 16% was spent on investments in housing and transportation, essential components of the stock of private and public physical capital. About 5% was provided for the development of natural resources on Indian-owned lands.

All of these investments are key building blocks in the process of achieving economic development. Indeed, true economic development for all groups, Indian or non-Indian, requires significant increases in investment in all of these areas.

It is not possible to estimate within the constraints of this study the economic development or growth that can be attributed to these investments. It is important, however, that they be viewed as potentially productive sources of economic growth regardless of the degree to which their potential has been quantified.

What is true at the national level also holds true for each of the individual states: larger outlays for assistance in programs which develop human and physical capital and natural resources should mean larger increases in economic growth at the state level. Since the breakdown of Oklahoma's federal Indian domestic assistance is less detailed than the corresponding national-level data, we cannot determine the exact proportion of federal Indian domestic assistance which went for these purposes in Oklahoma. Nonetheless the data in Graphic 4.16 suggest that it was at least as high as at the national level.

Thus, we expect that further analysis of this assistance as an investment in economic growth would be a fruitful endeavor for those concerned about the economic prospects for Oklahoma's American Indians and the state in which they live.

An economic impact assessment of federal Indian domestic assistance to Oklahoma will be provided in Section Five of this report.

SECTION FIVE: ECONOMIC IMPACT ANALYSIS

Most of the more important dimensions of economic activity attributable to Oklahoma's American Indians have been identified in the preceding sections of this report. Here our objective is to determine how important this activity is relative to the Oklahoma economy.

INDIAN-OWNED BUSINESSES:

In Section Four several economic measures of Indian-owned businesses in Oklahoma were discussed. Graphic 5.1, on page 56, shows how these measures compare with similar measures for the Oklahoma economy.

Column two of this table presents data for the 146 firms which returned the survey questionnaire. Column three contains estimates of each economic measure for the 383 firms in the Indian Business Directory. These estimates were constructed under the assumption that the 146 firms responding to the survey constitute a sample which is perfectly representative of the population of 383 Indian-owned firms. Column four contains data for all firms in the state of Oklahoma, with the exception of the following Standard Industrial Classification System categories: Finance, Insurance and Real Estate; and Transportation, Communications, and Public Utilities. The final column in this table indicates the percentage share of each economic measure which is attributable to Indian-owned businesses.

Graphic 5.1 clearly shows that the businesses listed in the Indian Business Directory constitute a very small part of the Oklahoma economy, accounting for 1% or less of business establishments, employment, payroll and sales.

The best measure of the net contribution of Indian-owned firms would be the Gross State Product (GSP) originating in these firms. GSP is the state-

Graphic 5.1

MEASURES OF INDIAN-OWNED AND ALL BUSINESSES IN OKLAHOMA

Economic Measure	Indian-Owned Businesses: Businesses Responding to the Survey	Indian-Owned Businesses: All Other Indian-Owned Businesses	All Oklahoma Businesses*	Indian Businesses as a Percentage of All Oklahoma Businesses
Number of Firms	146	383	65,240	0.6%
Number of Non-Government Employees	2925	6956	883,628	0.8%
Payroll ($ Millions)	43.3	109.9	15,551.5	0.7%
Sales ($ Millions)	360	951.4	94,711.5	1.0%

* Sources: County Business Patterns, the 1982 Census of Manufacturers, and the 1982 Census of Mineral Industries.

level counterpart of Gross National Product (GNP), the most commonly used measure of the contribution of all economic units comprising the United State economy. The GSP of Oklahoma's Indian-owned firms is the sum of all income, or value added, attributable to these firms. A measure of the GSP produced by Indian-owned businesses, which is not contained in Graphic 5.1, would be larger than payroll because it also includes income earned in the form of rent, interest, profits, proprietors' income, and allowances for depreciation. It would be smaller than total sales because it excludes sales receipts of each firm that are used to pay for purchases of products produced by other firms. In this manner GSP avoids the "double counting" of production.

The GSP originating in Indian-owned firms was estimated by combining the payroll reported in the sample survey in each Standard Industrial Classification System category with state-level ratios of GSP to payroll for each of these categories. In the Construction sector, for example, GSP is the product of a payroll of approximately $56 million and a GSP to payroll ratio of 1.76, or a total of $98.6 million. Total GSP for Indian-owned firms, figured in this fashion for each Standard Industrial Classification

System category, is $196.2 million. This is less than 0.4% of Oklahoma's estimated GSP of $52.1 billion in 1987.

TRIBALLY-OWNED BUSINESSES:

The best measure of the contribution of tribally-owned firms to the Oklahoma economy is also the GSP which originates in these firms. If we knew the distribution of these firms by Standard Industrial Classification System categories and the payroll for each, we could determine the GSP attributable to these businesses by using the procedure just outlined. Unfortunately, this information is not available from the sample of tribes returning the survey questionnaire.

We can, however, make a very rough estimate of the relevant GSP for this sample by assuming that it has a distribution of payroll and sales identical to the distribution of payroll and sales for all Oklahoma businesses. With this assumption we can use reported sales to estimate payrolls, and then use the latter to estimate GSP for tribally-owned businesses. This procedure yields an estimated GSP of $20.8 million. We do not know, however, the degree to which this estimate is representative of the 15 tribes which did not return the tribal business survey questionnaire.

TRIBAL GOVERNMENTS:

Governments typically produce a variety of useful services for their constituents, and tribal governments are no exception. Because most of these services are usually provided free of charge, or at a price below the cost of provision, economists measure governments' contributions to the economy primarily by the compensation paid to government employees. It is likely that this procedure produces an underestimate of the value of government services.

The tribal government survey questionnaire did not acquire information sufficient to determine the amount of tribal government expenditures paid to

tribal employees. However, the large number of tribal employees suggests that a large share of tribal government expenditures is for employee compensation. On this basis we can offer an upper bound estimate that the contribution of our sample of the tribal governments to the state's GSP is $40 million. Unfortunately, we have no basis for extending this estimate to the population of 31 tribes.

FEDERAL INDIAN DOMESTIC ASSISTANCE TO OKLAHOMA:

Federal government expenditures provide the means of support for the contributions of American Indians to the Oklahoma economy in at least five important ways.

First, the federal government purchases goods and services from Indian-owned or tribally-owned businesses. These purchases have been included in our estimates of sales by these firms.

Second, the federal government makes payments to its own employees who reside in Oklahoma and provide services to American Indians. These payments are a part of the GSP originating in the federal government sector of the state's economy and can be attributed to the presence of American Indians within the state.

Third, the federal government provides funds which are used by other governmental and private agencies in Oklahoma to hire employees who provide services to Oklahoma's American Indians. These payments are also a part of the GSP originating in the federal government sector and count as a contribution of American Indians to the Oklahoma economy.

Fourth, the federal government provides transfers in the form of checks to American Indians residing in Oklahoma through such transfers as Social Security and Veterans benefits. These payments constitute Oklahoma GSP in so far as they are spent directly and indirectly for goods and services produced in Oklahoma, and thus become income to other Oklahomans.

Fifth, the federal government provides transfers of income in-kind via programs such as Food Stamps, Education, Housing, and Medicare/Medicaid. These transfers also constitute Oklahoma GSP in so far as they reflect direct and indirect purchases of Oklahoma produced goods and services.

It is clear from even this brief discussion that expenditures by the federal government are an important source of the contribution of American Indians to the Oklahoma economy. However, precise estimates of the Oklahoma GSP contributed by these expenditures would require detailed knowledge of what was purchased with these funds, both directly by agencies and organizations disbursing the payments, and indirectly by individuals receiving them. Unfortunately, the acquisition of this information is well beyond the scope of this study, and our estimate of the total contribution of American Indians to the Oklahoma economy is surely an understatement of the true value of their contribution.

We reported in Section 4 that the federal government is projected to provide $299,894,264 in assistance to American Indians in Oklahoma in Fiscal Year 1987. These funds are provided through a variety of federal, state, and local agencies, Indian tribes and private organizations.

As we indicated above, much of this federal assistance really should be viewed as investments in human and physical capital and natural resources. An appropriate approach would be a benefit-cost analysis of these expenditures from the perspective of the state or tribe. Although this kind of analysis can be done for these types of programs, it is well beyond the scope of this study.

Such analysis would provide estimates of the income created by federal Indian assistance. These estimated could then be added to the preceding estimates of GSP originating in Indian-related activities, and would provide a fuller accounting of the contribution that American Indians make to the Oklahoma economy.

SUMMARY AND FINAL OBSERVATIONS:

We have identified four ways in which American Indians contribute to the Oklahoma economy: namely, through income created by Indian-owned businesses, tribally-owned businesses, tribal governments, and federal Indian domestic assistance. The first three of these sources accounted for $257 million in Gross State Product (GSP) in 1987. While the last of these sources, federal Indian domestic assistance, accounted for $299,894,264 in payments to Oklahoma in Fiscal Year 1987, we are unable to determine how much income, or GSP, is created as a consequence of these payments for reasons cited on the preceding page.

There are also additional federal payments to individual American Indians residing in Oklahoma for which we have not made an accounting. Included among these are Social Security and Veterans benefits, Food Stamps, AFDC payments, and Medicare/Medicaid. The cash transfers in this group create new production in Oklahoma when they are spent, and the in-kind transfers are a source of new production in so far as they involve goods and services produced in Oklahoma. However, we have ignored these transfers to individuals on the grounds that these are not Indian programs *per se* and that being an American Indian is not a criterion for eligibility.

What we have tried to do in Section Five is to determine how much of the state's income has been generated by Indian entrepreneurial activity, tribal governments, and by federal Indian domestic assistance to Oklahoma. Although our data are not complete, the probable total contribution from these sources seems relatively modest. What we have estimated accounts for less than 1% of the state's current GSP.

It must be understood, however, that one of the most important contributions of American Indians to the Oklahoma economy is missing from our accounts. This is the compensation paid to the over 50,000 American Indians

who are employed by employers other than the Indian tribes and Indian-owned businesses reported in our survey.

In 1980, wages and salaries for all Indian workers were 77% of wages and salaries for all Caucasian workers in the state of Oklahoma. Assuming, then, that Indian workers received 77% of the average employee compensation in Oklahoma, of $22,913 per employee in 1987, they add $17,643 per worker to Oklahoma's GSP, or approximately $882,000,000.

Part of this income represents a current pay-off from past investments in human and physical capital and natural resources. In this sense, current federal investments in Oklahoma's American Indians will show up in the form of future increases in wages and salaries, much of which will be captured by those who continue to reside in Oklahoma. It would be quite useful for planning purposes to obtain an estimate of this income flow at some point in the future.

The relative contribution of American Indians to the Oklahoma economy, as measured in this study, can be increased in two principal ways: by increasing federal payments to, or on behalf of, Oklahoma's American Indians, and by generating additional Indian entrepreneurial activity.

As emphasized above, the primary increases in federal payments that we envision are not cash transfers to individuals, although these are necessary components of an overall strategy; and should be viewed in many instances as investments in human capital. We would emphasize, instead, the investments in human and physical capital and natural resources that are unlikely to be made in the absence of federal assistance.

The data reported in section three suggest to us that there is still a gap between the development of the human capital of Oklahoma's American Indians and the state's non-Indian population. This implies, in particular, a need for further federal government investment in the areas of education,

health, and manpower training. The state government may well have an important role to play here, as well.

In addition, there are undoubtedly untapped economic possibilities in the area of Indian entrepreneurial activity, both through tribally-organized and individually-owned ventures. Our data actually tell us little about the prospects for tribal ventures, but they do suggest a payoff from more attention to the development of Indian entrepreneurs.

In our survey we identified a smaller number of Indian-owned businesses and a lower level of associated economic activity than one would expect based on the size of the Indian population of the state. Part of this difference between observation and expectation can be explained by the fact that there is a smaller share of the American Indian population in the age groups most likely to generate business ventures (25 - 60 years old) than in the non-Indian population. However, this adjustment for differences in the age structure of the Indian population still leaves American Indians underrepresented in terms of private business ownership.

Assuming that entrepreneurial talent is normally distributed throughout the population, these findings indicate that the development of additional Indian-owned business ventures would make a positive contribution to the state's economy. We do not know from our data precisely what is required to make additional strides in this area. We do believe, however, that there is a basis for further exploration of this means of achieving greater American Indian and Oklahoma economic development.

One such focus should be the high concentration of entrepreneurs in the construction industry. This concentration may actually be a sign of barriers to access in other industries. If this is the case, Indian entrepreneurs in the construction industry represent an underutilized pool of entrepreneurial talent, part of whom could shift to other sectors to the benefit of both the

individual entrepreneurs and the economy of the state at-large. This suggests the need to determine the extent to which there are barriers to the access of American Indian entrepreneurship in various industrial sectors within the state, and to develop means to address the deficiencies identified.

Finally, we find a surprisingly small concentration of business activity related to tourism, both on the part of Indian entrepreneurs and Indian tribes. Prospects in this industry also seem to warrant a further look.

In sum, we have identified several ways in which American Indians contribute to the Oklahoma economy, as well as potential avenues for increasing this contribution. It is hoped that the "Report on the Economic Impact of American Indians in the State of Oklahoma" will provide the state's Indian and non-Indian leadership with an important baseline of information on selected characteristics of Indian economic activity, and that it will help to focus attention on the present and potential contributions of Indian individuals and Indian tribes to the development of the state of Oklahoma.

APPENDIX ONE

"THE STATE OF AMERICAN INDIAN ECONOMIC DEVELOPMENT IN OKLAHOMA"

CONFERENCE PROGRAM

THE STATE OF AMERICAN INDIAN ECONOMIC DEVELOPMENT IN OKLAHOMA

A Statewide Conference for Indian and Non-Indian Leadership in the Public and Private Sectors of Oklahoma

May 27, 1987

Oklahoma Center for Continuing Education
The University of Oklahoma
1700 Asp Avenue
Norman, Oklahoma 73037

The conference is designed to provide significant information on the status of American Indian Economic Development in Oklahoma and to explore strategies to enhance American Indian economic activity and the economic relationships between the Indian nations, the state of Oklahoma, and local communities throughout the state.

The conference will feature major policy presentations on Indian economic development in Oklahoma and will serve as a forum in which important baseline information on Indian economic activity will presented and the economic impact of the Indian presence in the state of Oklahoma will be assessed.

"The State of American Indian Economic Development in Oklahoma" is specifically designed for Indian and non-Indian leadership in the state's public and private sectors: Indian tribal and community leaders; Indian-owned businesses; staffs of public agencies and elected public officials at the federal, state, regional, and local levels; Chamber of Commerce and other private sector leadership throughout the state; and leadership of state and local advisory and regulatory boards and commissions which deal with issues pertaining to economic development, employment, education, human services, and related issues.

CONFERENCE PROGRAM OUTLINE

7:30 - 8:30 A.M. **REGISTRATION**

8:45 - 12:00 Noon **MORNING PLENARY SESSION:**

Conference Opening and Welcoming Remarks:

Dr. Margaret Abudu Green
Executive Director
Southwest Center for Human Relations Studies

Dr. Joan Wadlow, Provost
The University of Oklahoma

Keynote Addresses:

"The State of the Nations Concerning Economic Development on Indian Country"

Mr. Danny Little Axe
First President
United Indian Nations of Oklahoma

"Perspectives on the Role of American Indian Economic Development in the State's Future"

Mr. Neal A. McCaleb
Secretary of Transportation
State of Oklahoma

Presentation of the Report on American Indian Economic Activity in Oklahoma:

"Report on the Economic Impact of American Indians in the State of Oklahoma"

Dr. Margaret Abudu Green
Executive Director
Southwest Center for Human Relations Studies

Dr. Kent W. Olson, Professor
Department of Economics
Oklahoma State University

Ms. Karen J. Salland, Director
Oklahoma State Data Center
Oklahoma Department of Commerce

Mrs. Iola N. Hayden
Executive Director
Oklahomans for Indian Opportunity

12:00 - 1:45 P.M. **LUNCH AND LUNCHEON PROGRAM:**

"The Commitment of the Bureau of Indian Affairs to Indian Economic Development"

Dr. Frank A. Ryan
Deputy to the Assistant Secretary
Indian Affairs, U.S. Department of Interior

2:00 - 2:45 P.M. **AFTERNOON PLENARY SESSION:**

"Youth 2000: Employment Goals for Indian Youth -- Generation to Generation Improvement"

Dr. Joan Elder
Acting Assistant Secretary
U.S. Department of Health and Human Services

3:00 - 5:00 P.M. **CONCURRENT PANEL SESSIONS:**

PANEL I - Indian Sovereignty: A Tool for Economic Development

This panel will examine ways in which indian sovereignty affects tribal economic development opportunities and economic development potential in the state of Oklahoma.

- Dr. Donald N. Brown
  Professor of Cultural Anthropology
  Department of Sociology
  Oklahoma State University **(Panel Moderator)**
- Mr. Gary Breshears, Executive Director
  Creek Nation of Oklahoma
- Mr. Bill Anoatubby, Lt. Governor
  Chickasaw Nation of Oklahoma
- Mrs. Frances M. Oheltoint
  Tribal Government Service Specialist
  Bureau of Indian Affairs, Anadarko

PANEL II - Governments to Governments: Self-Sufficiency Through Interdependence

This panel will examine what the state of Oklahoma, local communities, and the Indian Nations are doing in the area of economic development and strategies to enhance these relationships.

- The Honorable Enoch Kelly Haney, Senator
  State Senate of Oklahoma **(Panel Moderator)**
- Mr. G. Douglas Fox
  President and Chief Executive Officer
  Tribune/Swab-Fox Companies, Inc., Tulsa
- Mr. Donald D. Paulsen, Executive Director
  Oklahoma Department of Commerce
- Mr. Gaylon Franklin, Sr., Second Chief
  Sac & Fox Tribe of Oklahoma
- Mr. Jim D. Mason, Executive Director
  Cushing Chamber of Commerce

PANEL III- Why Do Indian Tribes Do Economic Development

This panel will examine the reasons why tribes are involved in economic development and how the benefits of economic development can be used. Panel members will react to and discuss a position paper which take a visionary look at what Indian tribal economic development could be and what the benefits of economic development could be for Indian persons, Indian communities, and the state of Oklahoma.

- Dr. William J. McNichols, Professor of Law
  The University of Oklahoma **(Panel Moderator)**
- Dr. Kenneth Reinfelt, Economist
  Office of Policy and Analysis
  U.S. Department of Interior
  Washington, D.C. **(Major Presenter)**
- Mrs. Iola N. Hayden, Executive Director
  Oklahomans for Indian Opportunity
- Mr. Jerry Bridges, Area Social Worker
  Anadarko Area Office, Bureau of Indian Affairs
- Mr. Edgar L. Pranch, President
  Delaware Tribe of Western Oklahoma
- Mr. Allen B. Wright, Indian Affairs Liaison
  Office of the Governor

COMPLIMENTARY RECEPTION
5:00 P.M. - 6:00 P.M.

APPENDIX TWO

SURVEY MATERIALS FOR INDIAN-OWNED BUSINESSES

The University of Oklahoma

SOUTHWEST CENTER FOR
HUMAN RELATIONS STUDIES
555 Constitution Avenue
Norman, Oklahoma 73037
(405) 325-3936

November 19, 1986

The University of Oklahoma Southwest Center for Human Relations Studies is implementing an important program on the Status of Minorities in the State of Oklahoma, under the guidance of four minority task forces.

The Task Force on the Status of American Indians in the State of Oklahoma (see attached) is assisting the Southwest Center in planning a statewide conference dealing with the Status of American Indians. This conference will be held in the Spring of 1987.

In preparation for the conference, the Southwest Center is conducting a study to document the amount of money and the number of jobs which are created by the presence of Indian tribes and individuals in this state.

This information will serve as an important tool for informing and educating state legislators, state leaders, and governmental agencies as to the economic significance of Indian communities within the state.

We are requesting that you complete the enclosed Information Sheet, which will provide the kind of information needed to compile this important document. Please note that we are requesting overall totals and summary information. We do not want to identify specific programs or businesses, and all information will be held in strict confidence.

We encourage your participation. If you have any concerns or questions, please feel free to contact me at (405) 325-3936.

Sincerely yours,

Dr. Margaret Abudu Green, Executive Director
Southwest Center for Human Relations Studies

MAG/lng
Enclosures

APPENDIX TWO

SURVEY MATERIALS FOR INDIAN-OWNED BUSINESSES

TASK FORCE ON THE STATUS OF AMERICAN INDIANS IN THE STATE OF OKLAHOMA

TASK FORCE MEMBERSHIP

Ms. Iola M. Hayden (Task Force Chair)
Executive Director
Oklahomans for Indian Opportunity
Norman, Oklahoma 73037
(405) 329-3737

Mr. James M. Cox, Chief of Police
Midwest City Police
100 North Midwest City Boulevard
Midwest City, Oklahoma 73110
(405) 732-2281

Ms. Juanita Learned, Treasurer
Cheyenne & Arapaho Tribes of Oklahoma
Post Office Box 38
Concho, Oklahoma 73022
(405) 262-0345

Dr. William J. McNichols, Professor
College of Law
University of Oklahoma
300 Timberdell Road
Norman, Oklahoma 73019
(405) 325-4699

Mr. Gary Breasheers, Executive Director
Creek Nation of Oklahoma
Post Office Box 580
Okmulgee, Oklahoma 74447
(918) 756-8700

Ms. Linda Poolaw, Treasurer
Delaware Tribe of Oklahoma
Post Office Box 986
Anadarko, Oklahoma 73005
(405) 247-2448

George Poolaw, Tribal Administrator
Kiowa Tribe
Post Office Box 369
Carnegie, Oklahoma 73015
(405) 654-2300

Mr. John R. Thorpe, Principal Chief
Sac & Fox Tribe of Oklahoma
Route 2, Box 246
Stroud, Oklahoma 74079
(918) 968-3526

Ms. Wathene Young, Member
Cherokee Tribal Council
9810 East 42nd Street, Suite 211
Tulsa, Oklahoma 74146
(918) 628-0450

APPENDIX TWO

SURVEY MATERIALS FOR INDIAN-OWNED BUSINESSES

INDIAN-OWNED BUSINESS PROFILE

INFORMATION SHEET

1. Name and Address of Business: _____

   _____

   _____

2. Average Total Number of Employees: _____

3. Approximate Annual Payroll: $_____

4. Approximate Dollar Volume of Gross Sales: $_____

5. Does your business help to generate tourism in your community? _____

6. If yes, estimate the total dollar volume of tourism generated in your community by your business presence: $_____

7. Please use the space below and on the reverse side for your comments or other information you would like to have included:

Name and Title of Person who completed this form: _____

_____

THANK YOU FOR TAKING THE TIME TO COMPLETE THIS INFORMATION SHEET.

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December 19, 1986

On November 19, 1986, this office mailed you the attached letter requesting your participation in a survey that the Southwest Center is conducting. We have received a great many responses and believe that our study will be a significant one which helps to document the economic contributions Indian tribes, businesses, and individuals make to Oklahoma's economy.

To ensure the significance of this study, we still need information on some businesses. Therefore, I am again requesting your cooperation. Please fill out the enclosed form and return it to the Southwest Center in the return envelope provided.

Kindly give this request your earliest possible attention. If you have any questions, please feel free to contact me at our toll free number: 1-800-522-0772, Extension 3936. I look forward to hearing from you and extend my best wishes for a happy holiday season.

Sincerely yours,

Dr. Margaret Abudu Green, Executive Director
Southwest Center for Human Relations Studies

MAG/lng
Enclosures: Letter of November 19, 1986
Membership List, American Indian Task Force
Indian-Owned Business Profile Information Sheet
Return Envelope

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February 19, 1987

On November 19, 1986, and again on December 19, 1986, the Southwest Center for Human Relations Studies sent you a letter inviting your participation in an important survey we are conducting to document the contributions that Indian tribes, businesses, and individuals make to Oklahoma's economy. To-date, we have received an exceptionally high survey response rate of 40 percent.

Based on the responses to this survey, a report on American Indian Economic Activity in Oklahoma is currently being prepared by the Southwest Center. This report will provide essential information on the following:

- the geographic distribution of Indian-owned businesses in Oklahoma;
- the types of businesses in which American Indians are involved;
- the total number of persons employed in Indian-owned businesses; and
- the total dollar volume of business generated by Indian-owned businesses.

Please note that survey findings will be reported as overall totals, and that individual businesses and programs will not be identified.

The American Indian Economic Activity Survey will be reported at a major statewide conference being planned by the Southwest Center. This conference, entitled **"The State of American Indian Economic Development in Oklahoma,"** will be held on May 27, 1987, at the Oklahoma Center for Continuing Education (OCCE), located at the University of Oklahoma. A very exciting conference program is being planned, which includes Mr. Ross Owens Swimmer, Assistant Secretary, Department of the Interior; and Dr. Jean Elder, Acting Assistant Secretary, U.S. Department of Health and Human Services; as well as key representatives from both Indian and non-Indian leadership within the State of Oklahoma.

The credibility and impact of the American Indian Economic Activity Report will be strengthened by your participation. Please complete the enclosed survey form and return it in the envelope provided no later than March 15, 1987.

Thank you for your time. I will keep you informed as conference plans develop.

Sincerely yours,

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APPENDIX THREE

SURVEY MATERIALS FOR FEDERALLY-RECOGNIZED INDIAN TRIBES

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HUMAN RELATIONS STUDIES
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Norman, Oklahoma 73037
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Enclosures

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TRIBAL ECONOMIC AND BUSINESS PROFILE

INFORMATION SHEET

TRIBAL ECONOMIC PROFILE

1. Name and Address of Tribe: _____

   _____

   _____

2. Total Number of Tribal Employees: _____

3. Total Tribal Budget: $_____

4. Total Federal and/or State Programs Budget: $_____

TRIBAL BUSINESS PROFILE

5. Total Number of Tribal Business Employees: _____

6. Approximate Annual Gross Sales: $_____

7. Estimate the dollar volume of tourism generated in your community by tribal cultural activities or tribal businesses: $_____

8. Please use the space below and on the reverse side for your comments or other information you would like to have included:

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Dr. Margaret Abudu Green, Executive Director
Southwest Center for Human Relations Studies

APPENDIX THREE:

LIST OF FEDERALLY RECOGNIZED TRIBES IN OKLAHOMA WHICH RECEIVED THE SURVEY

Absentee Shawnee Tribe

Apache Tribe of Oklahoma

Caddo Tribe of Oklahoma

Cherokee Nation of Oklahoma

Cheyenne/Arapaho Tribe

Chickasaw Nation of Oklahoma

Choctaw Nation of Oklahoma

Citizen Band Potawatomi Tribe

Comanche Tribe of Oklahoma

Creek Nation of Oklahoma

Delaware of Western Oklahoma

Fort Sill Apache Tribe

Iowa Tribe of Oklahoma

Kaw Tribe of Oklahoma

Kickapoo Tribe of Oklahoma

Kiowa Tribe of Oklahoma

Miami Tribe of Oklahoma

Modoc Tribe of Oklahoma

Osage Tribe of Indians in Oklahoma

Otoe-Missouria Tribe

Ottawa Tribe of Oklahoma

Pawnee Tribe of Oklahoma

Peoria Tribe of Indians in Oklahoma

Ponca Tribe of Oklahoma

Quapaw Tribe of Oklahoma

Sac & Fox Tribe of Oklahoma

Seminole Nation of Oklahoma

Seneca-Cayuga Tribe of Oklahoma

Tonkawa Tribe of Oklahoma

Wichita and Affiliated Tribes

Wyandotte Tribe of Oklahoma

APPENDIX FOUR

Graphic 4.18

DETAILED BUDGET BREAKDOWN FOR FEDERAL INDIAN DOMESTIC ASSISTANCE:
U.S. DEPARTMENT OF THE INTERIOR

	Fiscal Year 1986	Fiscal Year 1987
Bureau of Indian Affairs	**$1,005,693,000**	**$1,018,835,000**
Education Programs	257,299,000	272,180,000
Indian Services	211,588,000	221,498,000
Economic Development/Employment Programs	60,810,000	63,635,000
Natural Resources Development	140,887,000	142,394,000
Trust Responsibilities	49,056,000	50,127,000
Facilities Management	87,372,000	89,845,000
General Administration	75,767,000	81,503,000
Construction:		
Building & Utilities	36,344,000	48,110,000
Housing	42,564,000	22,606,000
Irrigation	17,438,000	17,885,000
Land Acquisition, Fire Suppression	16,972,000	----
Loan Guaranty Fund	2,103,000	2,452,000
Miscellaneous, one-time funding	7,493,000	6,600,000
Office of Surface Mining	**$ 2,274,000**	**$ 2,199,000**
Federal Indian Lands	925,000	923,000
Abandoned Mining Lands	1,349,000	1,276,000
Bureau of Reclamation	**$ 60,600,000**	**$ 51,383,000**
General Investigations, Construction, Operation & Maintenance, & Loan	60,600,000	51,383,000
Bureau of Land Management	**$ 8,000,000**	**$ 8,170,000**
Alaska Native Allotment Surveys	2,830,000	3,050,000
Oil & Gas Leasing	3,120,000	3,370,000
Coal, Uranium, & Non-Energy Minerals Management	1,650,000	1,450,000
Lower 48 Lands Program	400,000	300,000
Minerals Management Service	**$ 6,782,000**	**$ 7,050,000**
Royalty Management	6,782,000	7,050,000
Geological Survey	**$ 880,000**	**$ 425,000**
Hydrological Investigations	880,000	425,000
National Park Service	**$ 322,000**	**$ 332,000**
Park Service Assistance	322,000	332,000
TOTAL, DEPARTMENT OF THE INTERIOR	**$1,084,551,000**	**$1,088,394,000**

APPENDIX FIVE

Graphic 4.19

DETAILED BUDGET BREAKDOWN FOR FEDERAL INDIAN DOMESTIC ASSISTANCE:
INDIAN HEALTH SERVICE
U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES

Indian Health Service	Fiscal Year 1986	Fiscal Year 1987
Clinical Services:	**$ 680,168,000**	**$ 727,421,000**
Hospital & Clinics	437,625,000	479,767,000
Dental Care	25,830,000	25,849,000
Mental Health	11,487,000	11,362,000
Alcohol Treatment Program	24,381,000	27,705,000
Maintenance & Repair	8,505,000	9,025,000
Contract Health Care	172,340,000	173,713,000
Preventive Care:	**$ 64,955,000**	**$ 65,472,000**
Sanitation	20,596,000	22,307,000
Public Health Nursing	12,317,000	12,887,000
Health Education	3,779,000	3,883,000
Community Health Representative	25,585,000	26,000,000
Immunization Program	2,678,000	395,000
Direct Operations (program Mgmt.)	**$ 57,787,000**	**$ 36,410,000**
Tribal Management	**$ 1,968,000**	**$ 2,688,000**
Manpower	**$ 6,395,000**	**$ 7,018,000**
Urban Health Programs	**$ 9,644,000**	**$ 9,000,000**
Facilities	**$ 46,198,000**	**$ 37,010,000**
TOTAL, INDIAN HEALTH SERVICE	$ 867,115,000	$ 885,019,000

APPENDIX SIX

Graphic 4.20

DETAILED BUDGET BREAKDOWN FOR FEDERAL INDIAN DOMESTIC ASSISTANCE:
U.S. DEPARTMENT OF EDUCATION

	Fiscal Year 1986	Fiscal Year 1987
Office of Elementary & Secondary Education	**$305,636,000**	**$312,189,000**
Chapter 1	22,276,000	24,826,000
Indian Education	61,968,000	61,768,000
Impact Aid	214,000,000	214,000,000
Impact Aid Construction	7,177,000	9,250,000
Math & Science	215,000	400,000
Drug-free Schools & Communities	- 0 -	1,945,000
Office of Post-Secondary Education	**$ 3,038,000**	**$ 3,274,000**
Minority Institutions	335,000	350,000
Institutional Aid Program	2,703,000	2,924,000
Office of Special Education & Rehabilitative Services	**$ 12,858,000**	**$ 21,833,000**
Education of the Handicapped	11,518,000	17,130,000
Vocational Rehabilitation	1,340,000	4,703,000
Office of Bilingual Education	**$ 9,639,000**	**$ 10,511,000**
Office of Vocational & Adult Education	**$ 9,564,000**	**$ 10,414,000**
Libraries	**$ 1,658,000**	**$ 1,807,000**
TOTAL, DEPARTMENT OF EDUCATION	$342,393,000	$360,028,000